RightNow® 8.2

Service User Manual

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RIGHT NOW TECHNOLOGIES

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1

Introduction

RightNow's industry-leading customer service and support solution delivers high-value, consistent customer experiences across multiple customer service channels. Using RightNow Service, you can provide your customers with fast and accurate answers from phone, email, web, and chat requests. RightNow Service puts knowledge at the fingertips of your customer service agents to quickly and consistently help customers and enables your customers to help themselves with powerful and intuitive web and voice self-service capabilities.

RightNow Service is seamlessly integrated with RightNow Marketing, RightNow Sales, RightNow Analytics, and RightNow Feedback, enabling your organization to capture high-value insights from customer service interactions to drive better marketing experiences and product development decisions.

About this manual

This manual is intended for customer service agents and other staff members who work on incidents to answer customer questions, chat with customers using RightNow Live, and work with answers in the knowledge base. Refer to the *RightNow 8.2 User Manual* for an overview of the RightNow Console and information and procedures for performing tasks associated with areas that are common to all RightNow products, including RightNow Service, RightNow Marketing, RightNow Sales, and RightNow Feedback.

Chapter 2, Incidents—Contains the procedures for working with incidents, including viewing, editing, adding, and responding to incidents. This chapter also contains procedures for accessing SmartAssistant suggested answers, searching the knowledge base of published answers, and inserting standard text. Also included in this chapter are discussions about incident statuses and SLAs and procedures for presenting offers, creating opportunities, proposing incidents as answers, and re-queueing and reassigning incidents.

Chapter 3, Answers—Contains an overview of managing and seeding the knowledge base, organizing answers, and maintaining the knowledge base. This chapter also contains the procedures to search for, add, edit, and publish answers and manage answer relationships.

Chapter 4, RightNow Live—Contains procedures for responding to chat and phone requests using chat management tools, including RightNow Live Collaboration, transfer, and conference. Also included are procedures for inserting standard responses and URLs, searching for answers in the knowledge base, viewing customer session information, and creating incidents from chat sessions.

Chapter 5, End-User Interface—Contains a description of the main components of the end-user interface, including all the features available to customers and how customer actions affect staff members. These actions include searching for answers, logging in, accessing customer account information, requesting Live chat sessions, and asking questions. Also included is a description of the search techniques available to customers.

Chapter 6, Offer Advisor—Contains an overview of Offer Advisor and descriptions of promotions and suggestions. Also included in this chapter are procedures for opening Offer Advisor, searching for and selecting offers, and presenting promotions and suggestions to customers.

Chapter 7, Incident Archiving—Contains the procedures for accessing, searching for, viewing, and printing archived incidents.

Chapter 8, Accessibility Interface—Contains an overview of the accessibility interface (thin client) and how to navigate the interface. This chapter also contains the procedures for logging in to the accessibility interface and adding and editing incidents, organizations, contacts, and answers on this interface.

Appendix A, SmartSense Emotive Rating—Contains a description of RightNow's SmartSense emotive rating feature.

Documentation conventions

As you work with RightNow documentation, you will notice certain conventions used to convey information. To help you become familiar with these conventions, the following table contains examples and descriptions of the conventions used.

Convention	Description
Path: Common>Double-Click Staff Accounts	Identifies the path to open an administration item on the Administration Console. The administration option appears first, followed by the mouse action. **Note:** All paths appear immediately before figures in the documentation.

Convention	Description
Path: Right-Click Answer>Edit>Answer	Identifies the path to open a record on the content pane of the RightNow Console. The mouse action appears first, followed by the menu selection(s).
<angle brackets> as in: http://<your_interface>.custhelp.com/	Indicates variable information specific to your RightNow application.
Asterisk (*) preceding field names in tables	Indicates that the field is required. You cannot save a record, report, or file until you fill in all required fields. **Note:** In RightNow, required fields are flagged with a red bullet, or the field name appears in red text, or both.

RightNow 8.2 documentation

RightNow Technologies offers manuals, guides, and documents to help you install, administer, and use RightNow products, including RightNow Service™, RightNow Marketing™, RightNow Sales™, and RightNow Feedback™. Our documentation is written for users who have a working knowledge of their operating system and web browsers and are familiar with standard conventions such as using menus and commands to open, save, and close files.

RightNow 8.2 Administrator Manual—Contains procedures for configuring options common to RightNow Service, RightNow Marketing and RightNow Feedback, and RightNow Sales. This manual addresses staff management, common communications, custom fields, customizable menus, monetary configuration, business rules, system configuration, database administration, contact upload, multiple interfaces, screen pops, computer telephony integration (CTI), and the external suppression list.

RightNow 8.2 User Manual—Contains procedures common to all staff members, including customer service agents, marketing personnel, and sales representatives. This manual addresses organization and contact records, tasks, notifications, and CTI.

RightNow 8.2 Analytics Manual—Contains procedures for working with RightNow Analytics, including generating standard reports and creating custom reports and dashboards. Also included are descriptions of the elements used to build custom reports and dashboards, including styles, chart styles, color schemes, images, and text fields.

RightNow 8.2 Standard Reports Reference—Contains a description of each standard report available in RightNow Service, RightNow Marketing, RightNow Sales, and RightNow Feedback.

RightNow 8.2 Service Administrator Manual—Contains procedures for configuring RightNow Service. This manual addresses service level agreements, standard text and answer variables in the content library, product linking, the end-user interface, Offer Advisor, RightNow Live, RightNow Wireless, and incident archiving.

RightNow 8.2 Service User Manual—Contains procedures for customer service agents working with RightNow Service. This manual addresses incidents, incident archiving, Offer Advisor, RightNow Live, answers, the accessibility interface, and the end-user interface.

RightNow 8.2 Marketing User Manual—Contains procedures for staff members working with RightNow Marketing. This manual addresses audiences, the content library, mailings, and campaigns.

RightNow 8.2 Sales Administrator and User Manual—Contains procedures for the RightNow administrator and all staff members working with RightNow Sales. Procedures for the RightNow administrator include adding sales process options and quote templates, and configuring Outlook integration and disconnected access. Procedures for sales staff members include working with opportunities, quotes, Outlook integration, and disconnected access.

RightNow 8.2 Feedback User Manual—Contains procedures for all staff members working with RightNow Feedback. This manual addresses audiences, the content library, questions, and surveys.

RightNow Workstation Specifications—Contains recommendations for workstation hardware configurations, operating systems, and web browsers. Also included are requirements for RightNow Live, RightNow Sales, and computer telephony integration (CTI).

Important For a comprehensive list of system requirements, refer to Answer ID 31 on our support site at http://rightnow.custhelp.com.

RightNow 8.2 Release Notes—Contains a brief description of the new and expanded features in RightNow 8.2, including features common to all products and those specific to RightNow Service, RightNow Marketing, RightNow Sales, and RightNow Feedback.

RightNow HMS Guide—Contains upgrade instructions for customers hosted by RightNow Technologies.

RightNow SmartConversion Guide—Contains procedures for upgrading from RightNow CRM 7.5 to RightNow 8.2.

RightNow Integration Manual—Contains procedures for integrating the RightNow knowledge base with external systems, including help desks, data mining, and data reporting systems. Contact your RightNow account manager to obtain this manual.

Tip For a comprehensive list of all RightNow documentation, refer to http://community.rightnow.com/customer/documentation.

2

Incidents

When you work with customers to solve their support issues, you are instrumental in creating a positive impression of your organization. As an agent, you are often the customer's first point of contact, and it is important to resolve their concerns quickly and efficiently the first time. RightNow Service helps you do this by providing comprehensive, accurate, and up-to-date information about all aspects of the customer's communication with your organization.

Besides providing you with all-encompassing information just when you need it, RightNow Service gives you the tools to craft consistent, accurate answers to customer questions. It also allows you to forward incidents and propose them as new answers for the knowledge base.

In this chapter

- **Overview of incidents**—Provides an overview of incidents reports, the standard incident workspace, toolbar, fields, and record tabs. Refer to page 16.
- **Working with incidents**—Contains procedures to fill your inbox and search for incidents. Also contains discussions about incident statuses and SLAs and the procedures to apply SLA instances and credit incidents to SLAs. This section also includes the following procedures to edit an incident: editing key incident fields, adding responses, adding standardized content to responses, adding and editing contact information, tracking time spent on incidents, adding and editing tasks, adding and editing organization information, viewing the customer's session information, and attaching files to incidents. Additional procedures in this section include presenting offers to customers, creating opportunities from incidents, and sending responses. Refer to page 26.
- **Adding incidents**—Contains the procedure to add incidents. Refer to page 68.
- **Managing incidents**—Contains procedures to forward incidents, propose incidents as answers, delete incidents, update multiple incidents, and re-queue and reassign incidents. Refer to page 70.

Overview of incidents

When customers request help from your customer support group through email or the Ask a Question page on your support site, RightNow Service automatically creates incidents from their requests. Most of the time, these are the incidents you will respond to.

At other times, however, you will add incidents. For example, when a customer contacts you by phone, fax, or mail, you will add an incident to create a record of the customer's question.

When you edit or add an incident, you start by answering the customer's question. RightNow Service provides help through standard text, suggested answers, and the ability to search the knowledge base. You define specific information about the incident, such as the staff member it is assigned to, the associated products and categories, and the status and disposition of the incident.

Working with incidents also gives you the ability to add or update contact information, track the amount of billable time you spend on the incident, add or edit tasks related to the incident, attach files to the incident, view all actions taken on the incident, and present promotional offers to the customer.

Before or after you respond to the customer, you can forward the incident to others within and outside your organization. You might also want to propose the incident as a permanent answer in the knowledge base; this allows customers to view the answer without being required to submit an incident.

Incidents reports

When you click the Incidents button on the navigation pane, the navigation list displays all of the reports and items added to this button by your RightNow administrator. The Incidents button, plus all the other buttons you have access to, are part of the navigation set defined in your profile.

Incidents reports can be placed in other navigation lists, not just the Incidents navigation list. And if you have permission to customize your navigation set, you can add other items, including reports you have permission to access, to your Incidents navigation list or any of your lists.

Double-clicking any incidents report displays the report on the content pane. Figure 1 is an example of the My Inbox incidents report.

Note For information about working with reports, including the search filters that may appear when you double-click a report, refer to the *RightNow 8.2 Analytics Manual*.

Path: Incidents>Double-Click My Inbox

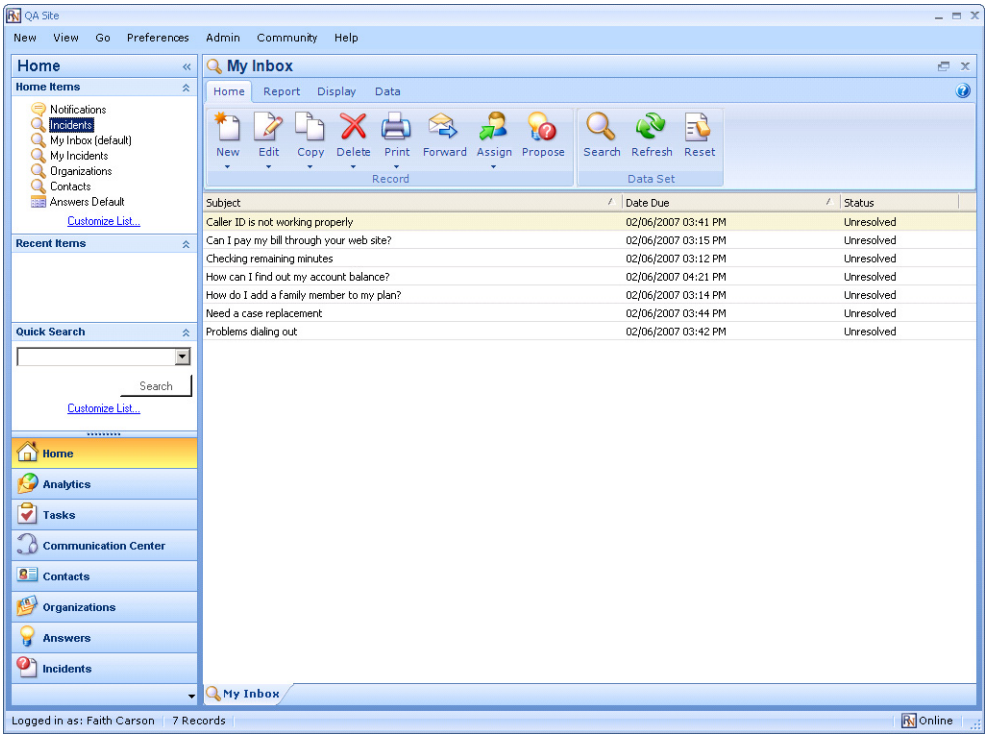


Figure 1: My Inbox Report

The incident information displayed on the content pane depends on the incidents report you opened and which fields were defined when the report was created. The My Inbox report, for example, displays the incident's subject, the due date, and its status. The ribbon allows you to add an incident; edit, copy, delete, print, forward, assign, and propose incidents; search for an incident, refresh the report, or reset the search criteria.

Note You can right-click any incident and select the same functions that are available on the incidents report ribbon.

Standard workspace for incidents

RightNow Service provides a standard workspace for working with incidents. The workspace defines which fields are available, which toolbars and buttons are displayed, and how the information is organized on the content pane. Figure 2 is an example of the standard incident workspace.

Path: New>Incident

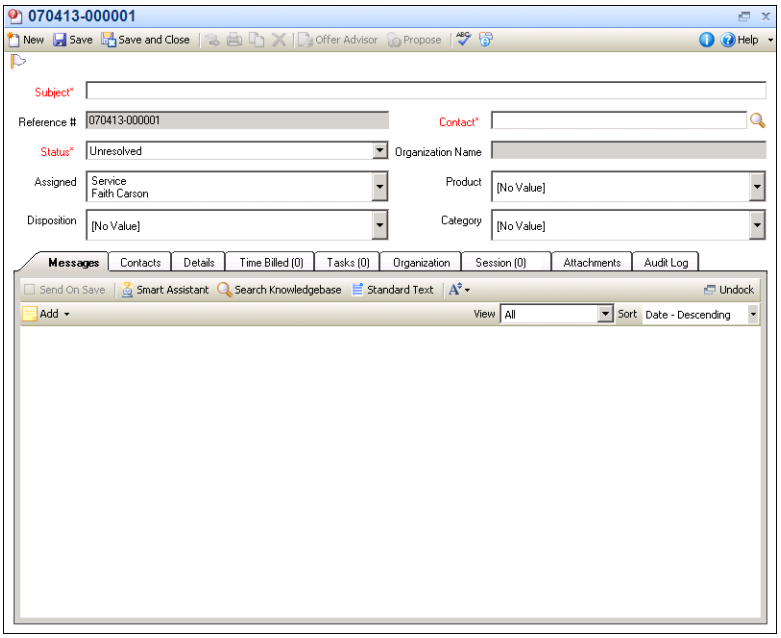


Figure 2: Standard Incident Workspace

Your organization may use this standard workspace, or your RightNow administrator may have created one or more customized workspaces. Your profile defines the workspace you see when you work with incidents, whether it is the standard workspace or a customized workspace. This chapter uses the standard workspace to describe how you work with incidents, but keep in mind that the workspace your profile uses may display a different combination of fields, or it may display them in a different location on the content pane.

Toolbar

Table 1 describes the toolbar buttons on the standard incident workspace.

Table 1: Incident Toolbar Description

Button	Description
	Click this button to add an incident. Most of the time, you will be editing incidents, but the procedure to add an incident is covered in "Adding incidents" on page 68.
	Click this button to save the incident you are working on. The incident remains open. **Note:** When you save an incident, it is evaluated by the rules engine. If your RightNow administrator added incident rules and the incident matches one or more of those rules, it is possible that the incident will be modified by rule actions when you save it. For example, a rule can change an incident's disposition or add suggested answers to the Response field of the Messages tab.
	Click this button to save the incident you are working on and close the incident.
 **Forward**	Click this button to forward the incident to any email address, staff account, or group. Refer to "Forwarding incidents" on page 70 for information. **Note:** This button is not enabled until after you have saved an incident you are adding.
 **Print**	Click this button to print the incident. **Note:** This button is not enabled until after you have saved an incident you are adding.
 **Copy**	Click this button to copy the incident. **Note:** This button is not enabled until after you have saved an incident you are adding.
 **Delete**	Click this button to delete the incident. **Note:** This button is not enabled until after you have saved an incident you are adding.

Table 1: Incident Toolbar Description (Continued)

Button	Description
	Select this option to open the Offer Advisor window, which allows you to present offers to the customer. For information, refer to "Presenting offers" on page 291. **Note:** If this button is disabled, either Offer Advisor is disabled or no promotions or product suggestions apply to the customer.
	Click this button to propose the incident as an answer. Refer to "Proposing answers" on page 73 for information. **Note:** This button is not enabled until after you have saved an incident you are adding.
 **Spell Check**	Click this button to check the spelling of any incident fields that have spell checking enabled. For information about spell checking, refer to the *RightNow 8.2 User Manual*.
 **Expand**	Click this button to toggle between displaying incident information on record tabs (as it is on the standard incident workspace) or on a scrolling view, where all information is on a single screen.
 **Info**	Click this button to see details about the incident, including when it was created and last updated, the date when the initial response was due, the date of the initial response, the date of the last response, the closed date, the staff member who created it, and the incident ID. If the incident is in a rules state or has an escalation level, that information also appears.
	Click this button to view online help for working with incidents.

Incident fields

When you work on an incident, the content pane contains incident fields and record tabs. The following incident fields are available on the standard incident workspace.

- Subject
- Reference #
- Status
- Assigned
- Disposition

- Contact
- Organization Name
- Product
- Category

Some of the fields are required by default, and your RightNow administrator may require that other fields also be completed. You must complete any field marked with a red label and asterisk before you can save the incident. The incident fields area of the standard incident workspace also includes a flag that allows you to define the incident's priority and type a message regarding the incident.

Path: New>Incident

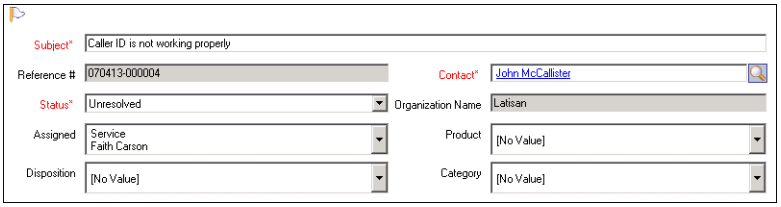


Figure 3: Incident Fields

For information about incident fields, refer to "Editing incident fields" on page 28.

Incident record tabs

The incident record tabs allow you to respond to the customer and add and edit other information relevant to the incident. The organization of these tabs allows you to work on an incident in stages if you choose, letting you save the changes and then return later to complete your work.

The following tabs may appear when you are working on incidents.

- Messages
- Contacts
- Details
- Time Billed
- Tasks
- Organization
- Session

- Attachments
- Audit Log

Important If you make changes to fields on any of the incident record tabs or any of the windows opened through the record tabs (for example, the contact editing window), you must save the incident in order for all changes on the record tabs to take effect. If you close the record without saving changes, you will be prompted to save your changes. If you do not, your changes on the record tabs will be lost.

Table 2 describes the actions available to you on each of the incident record tabs.

Table 2: Incident Record Tabs Description

Tab	Description
Messages	You can perform the following actions on the Messages tab. • Add a response, customer entry, or private note to the incident thread. Refer to "Adding responses" on page 35. • Filter and sort threads by type and date. • View suggested answers from SmartAssistant and insert links to the answers or the answer text into the incident response. Refer to "Adding SmartAssistant suggested answers" on page 39. • Search public answers in the knowledge base. Refer to "Searching the knowledge base" on page 41. • Insert standard text into your response. Refer to "Inserting standard text" on page 45. • Send a response to the customer. Refer to "Sending responses" on page 63.
Contacts	You can perform the following actions on the Contacts tab. Refer to "Adding and editing contact information" on page 47. • Add a contact to the knowledge base. • Edit contact information. • Copy and print a contact. • Remove a contact from the incident.

Table 2: Incident Record Tabs Description (Continued)

Tab	Description
Details	You can edit the following fields on the Details tab. Refer to "Adding incident information on the Details tab" on page 34. • Mailbox • Source • Severity • Interface • Language • SLA Instance • Queue
Time Billed	You can perform the following actions on the Time Billed tab. Refer to "Tracking your time" on page 50. • Add or edit information about the time you spend working on an incident. • Select the name of the agent working the incident and the type of billable task being performed. • Add notes to time billed information.
Tasks	You can perform the following actions on the Tasks tab. Refer to "Adding tasks" on page 52. • Add a task to the knowledge base. • Edit task information. • Copy, delete, print, and forward a task and mark a task complete.
Organization	You can perform the following actions on the Organization tab. Refer to "Adding organizations" on page 54. • Add and edit organization information. • View the organization's incident history. • View the contacts associated with the organization.
Session	The Session tab lets you view the actions the customer took before submitting the incident. Refer to "Viewing the Session tab" on page 55.
Attachments	The Attachments tab allows you to attach files to the incident. Refer to "Attaching files to incidents" on page 56.

Table 2: Incident Record Tabs Description (Continued)

Tab	Description
Audit Log	The Audit Log tab lets you view a history of all actions taken on the incident by staff members as well as any changes that were made automatically by RightNow Service through configuration settings and business rules.

Viewing incident activity

When you select the Audit Log tab, you can see whether other staff members have worked on the incident and what they have done. You can view when responses were sent and when the customer updated the incident. This information is valuable for keeping track of support interactions with customers, especially if more than one agent is working on the same incident. The Audit Log tab is shown in Figure 4.

Path: Right-Click Incident>Edit>Audit Log

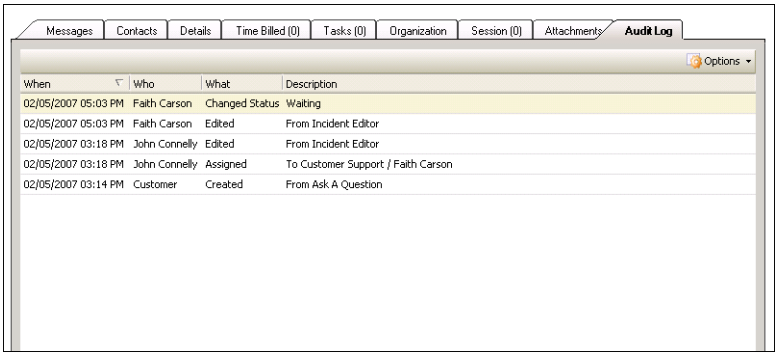


Figure 4: Audit Log Tab

Audit log information also displays any automatic actions that have been performed on an incident in RightNow Service, such as an automatic status change or any action performed as a result of a business rule. You can tell that the action was controlled by the system because the Who column contains Administrator in the field. Table 3 describes the information contained in the audit log.

Table 3: Audit Log Tab Description

Field	Description
When	This column lists the date and time of the action, with the most recent action listed first.
Who	This column lists the name of the staff member or customer who took the action. If Administrator is listed in this column, the action was the result of a business rule or an automatic update by RightNow Service.
What	This column lists the action taken on the incident.
Description	This column provides additional information about the action.

Working with incidents

As stated earlier, when a customer submits a question, RightNow Service automatically creates an incident that contains the subject, customer's question, and contact fields. You can complete an incident response in a single editing session, or you might find it useful to work on one part of the response and then return later to complete the rest of the incident.

The standard incident workspace enables you to quickly move from one section to the next as you work on incidents. You can edit any part of an incident in any order you choose. The procedures in this section follow the order of the fields and tabs on the standard incident workspace.

The majority of incidents will be assigned to you or pulled into your inbox. You can also manually add an incident in RightNow Service. For information, refer to "Adding incidents" on page 68. When incidents are assigned to you, some of the information in the record will be populated when you open the incident.

Filling your inbox

If your profile has incident editing permission and queues assigned to it, you can click the Fill Inbox button on the ribbon of any incidents report; however, the Fill Inbox button is not available on the Incidents tab toolbar of other records, such as contacts and organizations.

When you click the Incidents navigation button and double-click the default My Inbox report, the incidents that are assigned to you are displayed. As you respond to and solve incidents, their status changes to Solved or Waiting. You can continue to refill your inbox to retrieve new unresolved incidents.

To fill your inbox:

Click the Fill Inbox button on the ribbon of any incidents report.

Note If the displayed incidents report does not display incidents by assigned staff member, you can open the My Inbox report to view incidents that were added when you clicked the Fill Inbox button.

Unresolved incidents in any of the queues designated in your profile are available to be pulled. The order in which you work on incidents is determined by the queue priority and any processes set up by your RightNow administrator.

Searching for incidents

When you click the Incidents button on the navigation pane, a list of incidents reports is displayed in the navigation list. Double-clicking any incidents report displays a list of the incidents in the report on the content pane. Besides selecting an incident from a report, you have other options for finding and opening incidents.

- **Search for incidents from an incidents report**—If you do not immediately see the incident you want in the report, you can search for it. The filters that appear when you click the Search button depend on the report and which filters have been defined for it. For information about working with reports, refer to the *RightNow 8.2 Analytics Manual*.
- **Quick Search**—Quick Search allows you to search for a specific incident by reference number. You can enter the complete reference number, in which case the incident is opened, or just the first few characters, which results in a list of all matching incidents. For information about Quick Search, refer to the *RightNow 8.2 User Manual*.

Overview for editing incidents

You can search for the incident you want to open using the procedures described in "Searching for incidents" on page 27. Or you can open it from the list of records on the content pane by right-clicking it and selecting Edit. By default, the incident opens with the Messages tab positioned on top of the incident record tabs.

The following list provides an overview of the steps involved in working an incident. The sections that follow describe the procedure for each step in greater detail.

Note Incidents do not have to be completed in any particular order, but you must complete the required fields before you can save an incident.

- Complete the incident fields. Refer to page 28.
- Compose the response to the customer. Refer to page 35.
- To add content to your response, refer to page 39.
- To add or edit contact information, refer to page 47.
- To track the time you spend editing the incident, refer to page 50.
- To add or edit tasks associated with the incident or its contact, refer to page 52.
- To add or edit organization information, refer to page 54.
- To attach one or more files to the incident, refer to page 56.
- To present an offer to a customer who is eligible for one, refer to page 60.

- To create an opportunity for the sales department to follow up, refer to page 62.
- To send a response to the customer, refer to page 63.

You can save the incident at any stage of the process and either continue editing or close the incident and return later to complete it.

Important When you save an incident, it is evaluated by the rules engine. Your RightNow administrator may have added business rules to simplify and automate your work. For example, rules can change incident fields, apply an SLA instance, add suggested answers to your response, and take many other actions automatically. If you save an incident without closing it and the incident matches one or more rules, it is possible that the incident will be automatically modified by the rules engine. If you notice that changes have been made to the incident, you may want to check with your RightNow administrator to verify that they are the result of rule actions.

Editing incident fields

The fields you see when adding or editing an incident are defined in a workspace that is assigned to your profile. Required fields are labeled in red and have a red asterisk next to them; you cannot save an incident without completing all the required fields.

One of the fields you are required to complete is the Status field. The following section provides an overview of this field.

Understanding incident statuses

Incidents can have one of the four default incident statuses, or they may have a custom status defined by your RightNow administrator. The default statuses are Unresolved, Solved, Updated, and Waiting.

Depending on how RightNow Service has been configured in your organization, the status can change automatically when you or the customer make changes to the incident. You can also change an incident's status manually.

The following example describes how an incident's status can change automatically.

Step 1 A customer submits a question from the Ask a Question page. The new incident has a status of Unresolved.

Step 2 The customer updates the question before you begin working on the incident. The incident remains unresolved, but the incident status changes to Updated to reflect the customer's actions and alert you to the change.

Step 3 You edit the incident and send a response to the customer. Your system may be configured in either of the following ways to automatically change the status, or it may be configured so that no status change occurs.

- The incident's status changes to Solved.

Important

Regardless of how your system is configured, the status of an incident automatically changes to Solved when the customer selects the "I no longer need an answer to this question" check box on the Update My Questions page or through the link in the email response. You will receive an incident notification.

- The incident's status changes to Waiting.

  The Waiting status signifies that you have sent a response and are waiting for the customer to let you know if this answers the question. If your system has this configuration and the customer does not respond within forty-eight hours (the default time), the system automatically changes the status to Solved and sends an email to the customer.

Understanding SLAs

Another field you may work with is the SLA Instance field. This section describes SLAs, SLA instances, how to apply SLA instances, and how to credit incidents to them.

An SLA is a service level agreement. SLAs allow your organization to assign and track customer service, such as the number of questions a customer can submit through different channels and the duration of support.

Both contacts and organizations can have SLAs, but contacts that are associated with an organization do not have individual SLAs. Instead, their incidents are credited to their organization's SLA. Only contacts that do not have an organization association can have SLAs.

Your RightNow administrator creates an SLA, which is a generic service contract that has not been applied to any specific customer. An SLA instance is a copy of the generic SLA applied to a specific customer; SLA instances can be applied manually by staff members whose profiles grant them permission to work with SLAs or automatically through business rules in RightNow Service.

When you work on an incident for a customer who has an SLA, you can credit that incident to the SLA. If the customer does not have an SLA, you must apply an SLA instance before you can credit the incident. The following procedure describes how to apply an SLA instance when you are working on an incident.

To apply an SLA instance to a contact or organization:

1 Right-click the incident on the content pane and select Edit>Contact or Edit>Organization.

2 Click Add (if no SLAs have been applied to the customer) or Edit in the SLA field to open the SLA Viewer window. Any SLA instances that have already been applied to the customer are displayed under SLA Instances.

Note If you select Edit>Contact and the contact is associated with an organization, the SLA field contains "See organization for SLA Details." Return to the incidents report on the content pane, right-click the incident, and select Edit>Organization.

Path: Right-Click Incident>Edit>Contact (or Organization)>Add

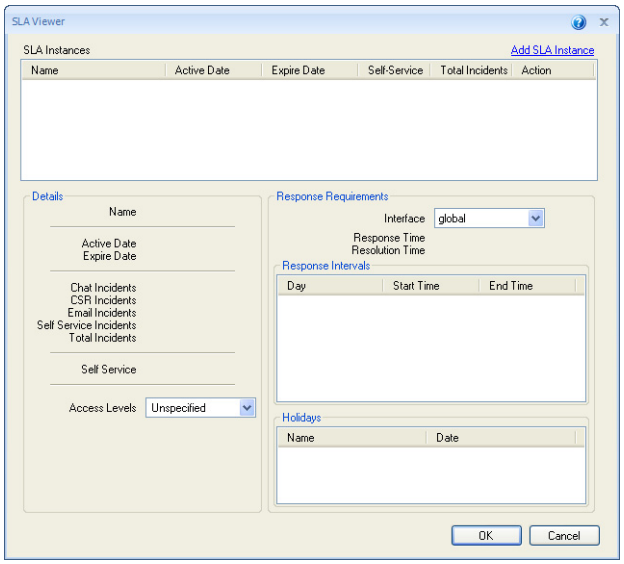


Figure 5: Viewing SLAs

3 Click Add SLA Instance to open the Add New SLA Instance window.

Path: Right-Click Incident>Edit>Contact (or Organization)>Add>Add SLA Instance

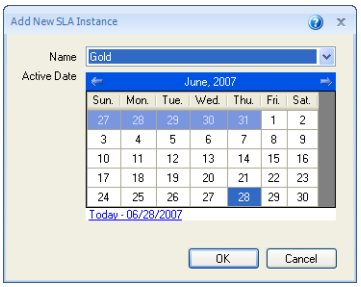


Figure 6: Adding an SLA Instance

4 Click the Name drop-down menu and select an SLA.

5 Select an active date by clicking a day on the current month's calendar (or, to change the month, click the right or left arrow in the month heading). Today's date is selected by default.

6 Click the OK button to apply the SLA instance to the customer. The Add New SLA Instance window closes and the SLA instance is added.

7 Click the OK button to close the SLA Viewer window.

Once an SLA instance has been applied to the customer, you can credit incidents submitted by that customer against the SLA instance as long as the incident occurs within the active date period.

To credit an incident to an SLA instance:

1 Right-click the incident on the content pane and select Edit>Incident.

2 Click the Details tab.

3 Click the drop-down menu on the SLA Instance field and select an SLA instance. The incident is credited to the SLA instance you select.

Note Every time an incident is credited to an SLA instance, the number of available incidents is reduced. When the last incident is credited, the customer's SLA is disabled.

4 Click the Save button to save the incident.

Editing key incident fields

Now that you understand the role of incident statuses and SLAs, you can edit the key incident fields. The procedure in this section describes the standard incident workspace; keep in mind that your workspace may contain different fields. Fields marked with a red label and asterisk are required fields and must be completed before you can save the incident.

To edit key incident fields:

1 Right-click the incident on the content pane and select Edit>Incident.

Path: Right-Click Incident>Edit>Incident

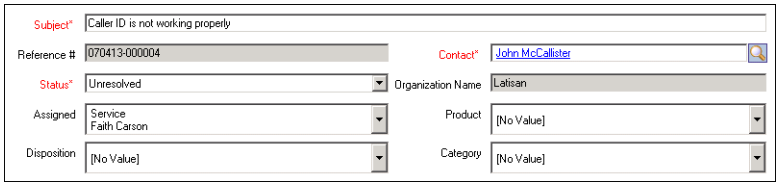


Figure 7: Editing Key Incident Fields

2 Enter field information described in Table 4.

Table 4: Incident Fields Description

Field	Description
***Subject**	Type a subject for the incident in this field. If the customer originated the incident, this field contains the customer's summary of the question, which you can edit if necessary (for example, to make the question more specific).
Reference #	The incident's reference number is a read-only field with a value assigned by RightNow Service.
***Status**	Click this drop-down menu and select an incident status. The options include Solved, Unresolved, Updated, and Waiting, as well as any custom incident statuses added by your RightNow administrator. For information, refer to "Understanding incident statuses" on page 28.

Table 4: Incident Fields Description (Continued)

Field	Description
Assigned	Click this drop-down menu and select a staff member to assign the incident to. For information, refer to "Re-queuing and reassigning incidents" on page 77. **Note:** In the standard incident workspace, this field contains your name by default.
Disposition	Click this drop-down menu and select a disposition that indicates the resolution of the incident. There may be multiple levels of dispositions for you to select.
***Contact**	Click the Search button to the right of the Contact field to search for a contact to add to the incident; for search procedures, refer to the *RightNow 8.2 User Manual*. Or to add a contact, click the New Contact button on the open Contact Search window; refer to "Adding and editing contact information" on page 47. **Note:** If the customer submitted the incident, this field contains the customer's name.
Organization Name	This field contains the name of the organization for the contact associated with the incident. Depending on workspace properties for the field, it may be a read-only field or it may be required.
Product	Click this drop-down menu and select one or more product levels to indicate the product for the incident.
Category	Click this drop-down menu and select one or more category levels to indicate the category for the incident.

3 To add a flag to the incident, click the area next to the white flag under the toolbar.

a To change the importance of the flag from No Importance, select red (High), blue (Medium), or green (Low).

b To add text to the flag or edit an existing flag, select Edit Flag Text and add or edit text in the Edit Flag window that opens.

4 To add other key incident fields, click the Details tab and refer to "Adding incident information on the Details tab" on page 34.

Adding incident information on the Details tab

The standard incident workspace contains a Details tab where you can enter additional information about the incident.

To add incident information on the Details tab:

1 Right-click the incident you want to edit and select Edit>Incident.

2 Click the Details tab.

Path: Right-Click Incident>Edit>Incident>Details

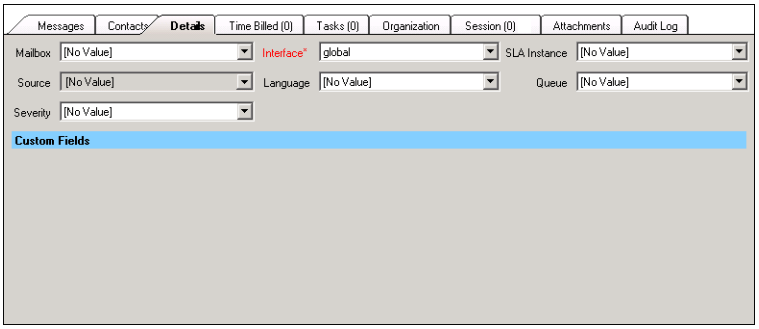


Figure 8: Adding Incident Information on the Details Tab

3 Enter field information described in Table 5.

Table 5: Incident Fields on the Details Tab

Field	Description
Mailbox	Click this drop-down menu to select the mailbox from which the incident response will be sent.
Source	This is a read-only field that identifies the source of an incident, whether it is added from the RightNow Console or the end-user interface.
Severity	Click this drop-down menu to select a severity level for the incident.

Table 5: Incident Fields on the Details Tab (Continued)

Field	Description
***Interface**	Click this drop-down menu and select an interface. **Note:** By default, the incident's interface is set to the interface where the incident was created; usually, you will not need to change it. Among other things, the interface determines the language of the message bases used for automatic responses to the incident.
Language	Click this drop-down menu and select a language. **Note:** If your site has multiple interfaces for different languages, be sure you have also selected the interface that uses the language you want used in the response to the customer.
SLA Instance	Click this drop-down menu to credit the incident to an SLA instance that has been applied to the contact or the organization to which the contact belongs. Refer to "Understanding SLAs" on page 29 for information about applying SLA instances and crediting incidents to them.
Queue	Click this drop-down menu and select a queue into which to move the incident from your inbox. Refer to "Re-queuing and reassigning incidents" on page 77.
Custom Fields	If your RightNow administrator has added incident custom fields, you can enter that information on the Details tab.

Adding responses

The incident thread, which displays communication between the customer and agent, is located on the Messages tab shown in Figure 9. The type of entry—customer entry, response, or private note—is indicated by color coding on the tab. Using the View drop-down menu, you can filter displayed threads by type; use the Sort menu to display threads by descending or ascending date.

Path: Right-Click Incident>Edit

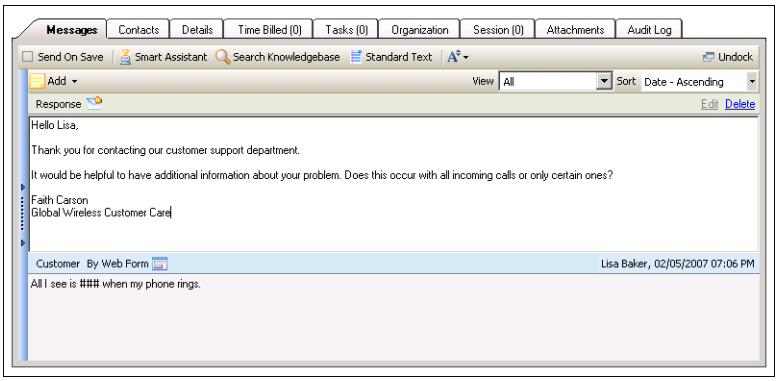


Figure 9: Adding a Response on the Messages Tab

The customer's question, if submitted through the end-user interface, appears as a Customer thread. You can also enter the question for the customer if, for example, you are responding to a phone call; that thread appears as a Customer Entry. Besides adding a Response thread, you can also add a Private Note thread, which can be read by other staff members but not by customers.

Note Whenever a valid incident reference number appears in any incident thread (Customer, Customer Entry, Response, or Private Note), it is displayed in green text in the thread and is a link that opens the incident in a separate work group when you click it. In order for RightNow Service to create a clickable link from an incident reference number, the number must use the format ######-######.

To save time and make your responses accurate and consistent, you can add predefined content, including standard text or SmartAssistant suggested answers. You can also search for answers that are related to the customer's question.

The Messages tab lets you send the response to the customer when you save it; if you want, you can send the incident to other recipients as well by adding their email addresses to the Cc and Bcc fields. The send response functionality also allows you to attach files to the incident and select secure email options.

Table 6 describes the toolbar buttons that appear on the Messages tab.

Table 6: Messages Tab Toolbar Description

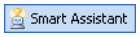
Button	Description
	Select this check box to send your response to the customer when you save the incident. Refer to "Sending responses" on page 63.
	Click this button to select one or more answers you can insert into your response as either text or a URL link. Refer to "Adding SmartAssistant suggested answers" on page 39.
	Click this button to search for answers to help you respond to the customer. Refer to "Searching the knowledge base" on page 41 for information.
	Click this button to select and insert a predefined piece of information into the response; for example, you might select a greeting, closing, or response to a common question. Refer to "Inserting standard text" on page 45.
	Click this button and select a font size for the information in the incident thread; the options are Normal, Larger, and Largest. All text in all of the threads changes to the size you specify.
	Click this button to display the incident thread in a separate window. For information about docking windows and using work groups, refer to the *RightNow 8.2 User Manual*.
	Click this button and select one of the following options before typing text in the field.
Customer Entry	Select this option to enter information on behalf of the customer; for example, select Customer Entry when the customer's question occurs during a phone call.
Response	Select this option to type your response to the customer's question.
Private Note	Select this option to type text that you want to be viewed only by other staff members; customers cannot view this information.
View	Click this drop-down menu to select a view option. The options include Note, Customer, Customer Entry, Response, Chat Transcript, Auto-Response, and Auto-Response Note.

Table 6: Messages Tab Toolbar Description (Continued)

Button	Description
Sort	Click this drop-down menu to sort the messages by descending or ascending date on the Messages tab. **Note:** Regardless of your sort selection on the Messages tab, the response the customer receives is always sorted in descending order, with the newest message at the top of the incident response.

To add a response to an incident:

1 Right-click the incident on an incidents report and select Edit>Incident.

2 If the Messages tab is not on top, click Messages. (On the standard incident workspace, this tab is displayed when an incident is opened.)

3 Click the Add button and select Response.

◈ **Tip** You can also press **Alt+a, r** to open a response thread.

4 Type your response to the customer's question in the text window.

To add a customer entry or private note to an incident:

1 Right-click the incident on the content pane and select Edit>Incident.

2 On the Messages tab, click the Add button and select Customer Entry or Private Note.

◈ **Tip** You can also press **Alt+a, c** to open a customer entry thread or **Alt+a, n** to open a private note.

3 To identify a channel for a customer entry, click the By Phone drop-down menu in the Customer Entry title bar and select one of the following options: No Channel, By Phone, By Fax, or By Post.

4 To identify a channel for a private note, click the Note Channel button (next to Private Note under the Add button) and select one of the following options: No Channel, By Phone, By Fax, or By Post.

5 Type the customer entry or note in the text window.

Adding content to the response

RightNow Service has tools that help you save time, eliminate mistakes, and provide consistent information to customers. These tools include the ability to attach links to answers in the knowledge base, insert the actual text of answers into the response, search the knowledge base for specific answers to include, and insert standard, predefined text.

Adding SmartAssistant suggested answers

SmartAssistant is a tool in RightNow Service that helps you find solutions to customer questions. SmartAssistant evaluates the language of a customer's question and suggests possible answers. You can then insert either a link to the answer or the actual text of the answer into your response.

To add SmartAssistant suggested answers:

1 Click the Smart Assistant button on the Messages tab. A list of possible answers is displayed, with columns for ID, Summary, Weight, Access, and Status. You can sort by any of the columns.

Path: Messages>SmartAssistant

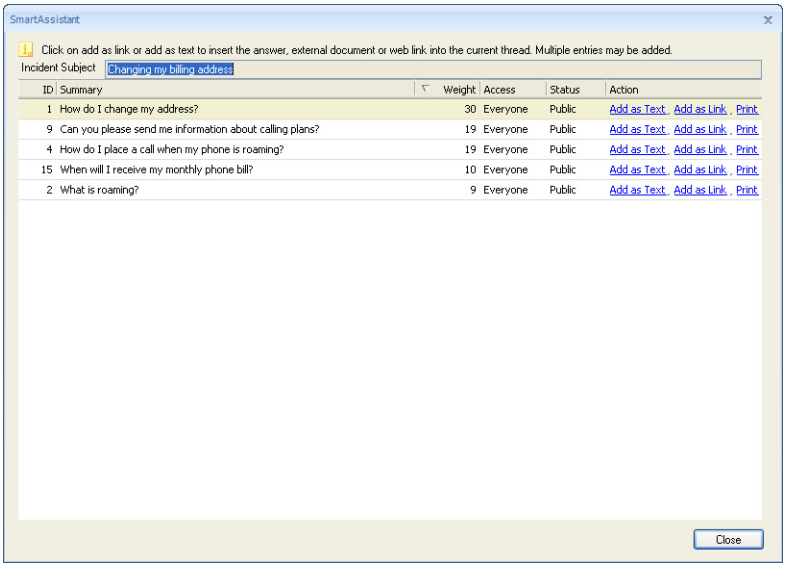

SmartAssistant
Click on add as link or add as text to insert the answer, external document or web link into the current thread. Multiple entries may be added.
Incident Subject
Changing my billing address
ID
Summary
Weight
Access
Status
Action
1 How do I change my address? 30 Everyone Public Add as Text , Add as Link , Print
9 Can you please send me information about calling plans? 19 Everyone Public Add as Text , Add as Link , Print
4 How do I place a call when my phone is roaming? 19 Everyone Public Add as Text , Add as Link , Print
15 When will I receive my monthly phone bill? 10 Everyone Public Add as Text , Add as Link , Print
2 What is roaming? 9 Everyone Public Add as Text , Add as Link , Print
Close

Figure 10: Finding SmartAssistant Suggested Answers

2 To include the text of an answer in the response, click Add As Text in the Action column. The answer content is added to the response.

◈ **Tip** You can also enter answer text if you know an answer's ID by pressing **F9** from the incident response on the Messages tab, typing the Answer ID number in the Append Answer Text window that opens, and pressing **Enter**.

Path: Action>Add As Text

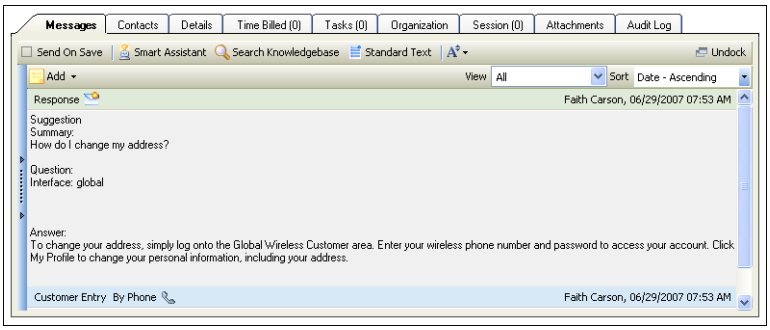


Figure 11: Inserting Text from a SmartAssistant Answer

◈ **Tip** You can edit the answer text before sending the response.

3 To add an answer's URL link to the response, click Add As Link in the Action column on the right.

Path: Action>Add As Link

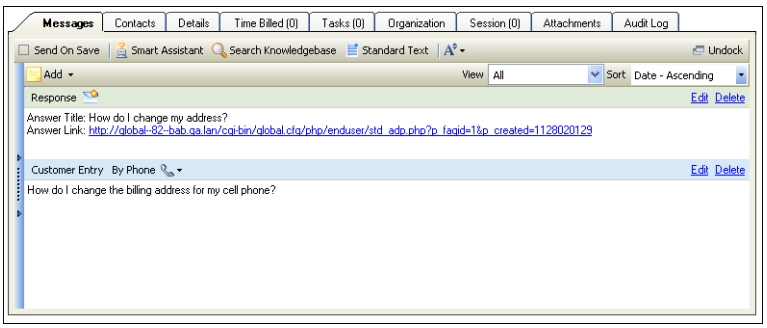


Figure 12: Inserting a Link to a SmartAssistant Answer

4 To print the suggested answer, click Print in the Action column. The Print Dialog window opens, displaying the answer as it appears on the end-user interface.

Searching the knowledge base

As you respond to a customer's question, you might remember answers that address similar issues. Rather than conducting a time-consuming hunt of the knowledge base to find the relevant answers, RightNow Service lets you search for the answers you want. Using any of four text searching techniques, you can quickly identify answers to resolve a customer's question.

Note If you try to insert a link to an answer or text from an answer when no threads are open for editing, the operation will fail because you have not specified an insertion point.

To search for an answer:

1 Click the Search Knowledge Base button on the Messages tab to open the Search Knowledge Base window.

Path: Messages>Search Knowledge Base

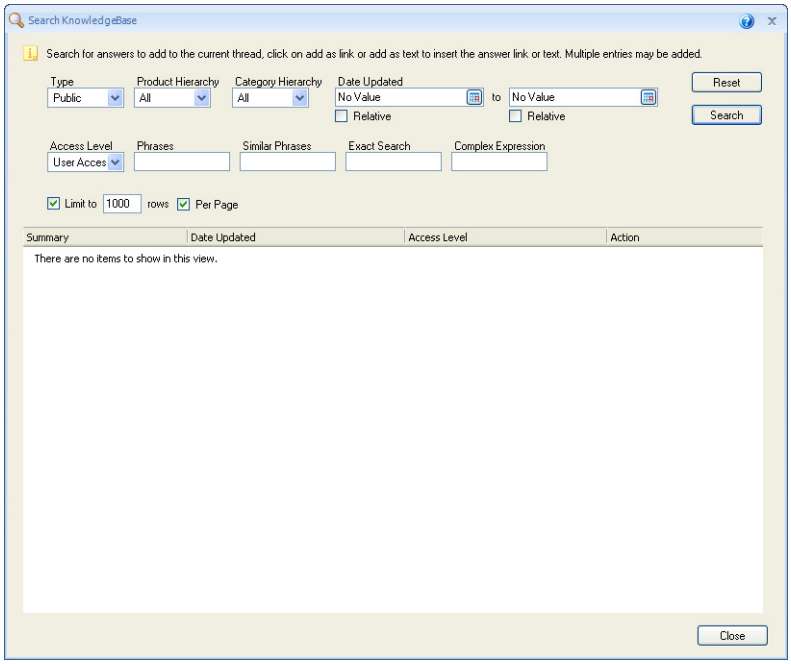


Figure 13: Searching the Knowledge Base for Answers

2 To search for answers by type, click the Type drop-down menu and select the Public or Private check boxes or both. By default, Public is selected.

3 To filter answers by product, click the Product Hierarchy drop-down menu and select the products you want the returned answers to be associated with. By default, all products are selected.

4 To filter answers by category, click the Category Hierarchy drop-down menu and select the categories you want the returned answers to be associated with. By default, all categories are selected.

5 To filter answers by the date they were updated, you can select either a date range or a time period.

a To select a date range, click the calendar on the left and select a start date. Then click the calendar on the right and select an end date.

b To select a time period, select the Relative check box. Then select the offset and units for the relative date and whether the time period is exact or rounded. For more information about understanding date ranges, refer to the *RightNow 8.2 Analytics Manual*.

6 To filter answers by access level, click the Access Level drop-down menu and select the check boxes for the access levels you want the returned answers to be associated with. By default, the access level User Access is selected.

7 To search for answers based on content, enter field information described in Table 7.

Note All search types look for different word forms such as singular, plural, or different verb tenses. For example, searching for *reflect* will find answers that contain *reflection, reflections, reflected, reflecting,* or *reflects*.

All search types use the logical operators + (AND) and – (NOT). Insert + before a word to find answers that must include the word; insert – before a word to exclude answers containing that word.

The answer's Summary, Question, Answer, and Keywords fields are searched for matching terms.

Table 7: Search Knowledge Base Window Description

Field	Description
Phrases	Select this search technique to search for answers containing words in the phrase or question you type. Multi-word phrases usually produce better search results.
Similar Phrases	Select this search technique to search for answers that contain the words or phrase you type as well as answers containing synonyms for the words you enter.
Exact Search	Select this search technique to search for answers with the same pattern of words as the words you type. Only answers containing an identical pattern of words are matched, although the words in matching answers may be separated by stopwords such as *a, an,* or *the*.
Complex Expression	Select this search technique to search for answers containing the complex expression you type. This technique allows wildcard searching using an asterisk (*) at the end of a word or partial word and a tilde (~) before a word to perform a similar phrases search on that word only. For information about special characters in a complex expression search, refer to "Using special characters when searching" on page 105.

8 To limit the number of answers returned from the search, select the Limit check box and type the number of rows in the field.

9 Click the Search button to display the related answers.

Path: Messages>Search Knowledge Base>Search

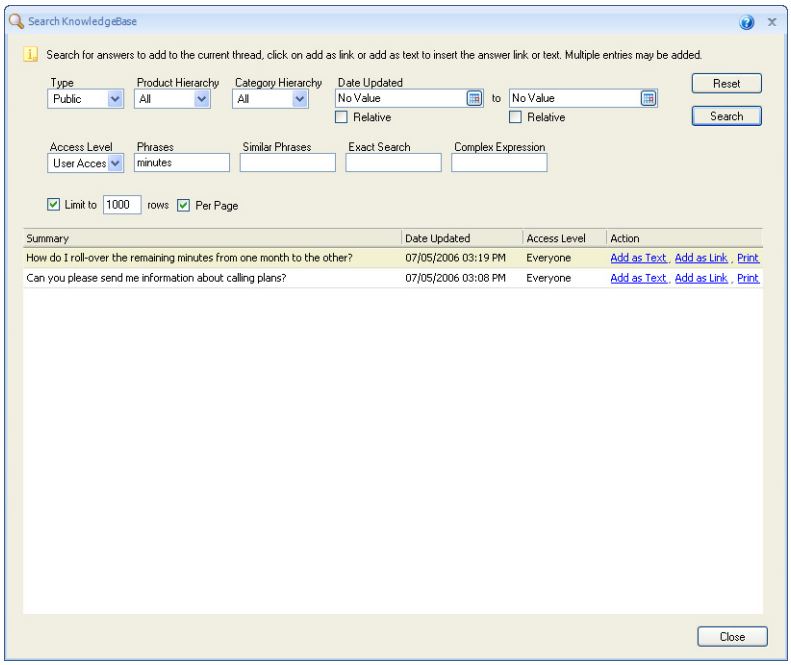


Figure 14: Answers Returned from a Search

10 To sort answers in a column, click the column heading to toggle between sorting in ascending or descending order.

11 To include the text of an answer in the response, click Add as Text in the Action column. The answer content is added to the response.

12 To add an answer's URL link to the response, click Add as Link in the Action column. A link to the answer is included in the response.

13 To print the answer, click Print in the Action column. The Print Dialog window opens, displaying the answer as it appears on the end-user interface.

14 Click the Close button to close the Search Knowledge Base window.

Inserting standard text

When you are busy responding to customers' questions, you will appreciate having the routine parts of your job streamlined as much as possible. For example, you would probably welcome a shortcut as an alternative to typing a standard greeting and closing for every email response you send. Your RightNow Service administrator can create standard text for routine situations so you can insert a text item into a response.

You can insert standard text from the Standard Text window or, if you know the hot key sequence for the text item, you can type it without opening the Standard Text window.

Note If you try to insert standard text when no threads are open for editing, the operation will fail because you have not specified an insertion point.

To insert standard text from the Standard Text window:

1 In your response, position the cursor where you want to insert the standard text.

2 Click the Standard Text button on the Messages tab to open the Standard Text window.

Note If multiple incidents are open, an Incident drop-down menu appears so you can select the incident where you want to place the standard text item. The default value in the drop-down menu is the incident you opened Standard Text from.

3 To expand folders containing standard text items, click the Expand All button at the bottom of the left column.

4 Click the standard text item you want to insert in your response. The contents are displayed in the Preview section of the window.

Path: Messages>Standard Text>Expand All>Click Standard Text Item

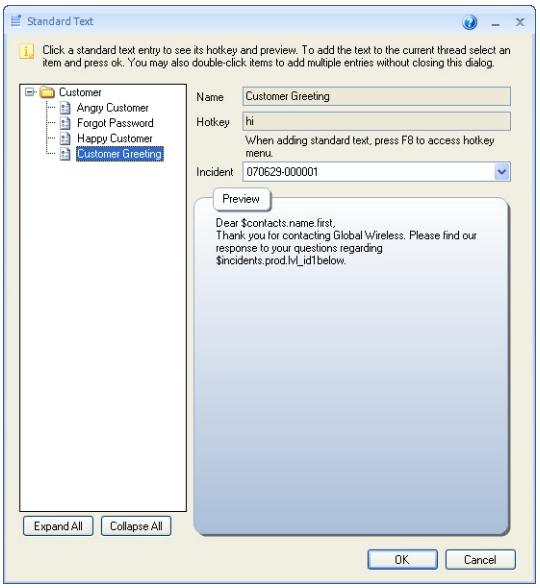

Standard Text
Click a standard text entry to see its hotkey and preview. To add the text to the current thread select an item and press ok. You may also double-click items to add multiple entries without closing this dialog.
Customer
Angry Customer
Forgot Password
Happy Customer
Customer Greeting
Name
Customer Greeting
Hotkey
hi
When adding standard text, press F8 to access hotkey menu.
Incident
070629-000001
Preview
Dear $contacts.name.first,
Thank you for contacting Global Wireless. Please find our response to your questions regarding $incidents.prod.lvl_id1below.
Expand All
Collapse All
OK
Cancel

Figure 15: Selecting a Standard Text Item

5 To change the incident where you want to insert the standard text, click the Incident drop-down menu and select a different incident.

6 Click the OK button to close the Standard Text window and insert the text into your response.

Or

Drag the standard text item from the left column into the response.

7 To add other standard text items to the response, repeat steps 1 through 6.

8 To modify the standard text, edit it as necessary in the response.

Note If the standard text includes one or more variables, such as the contact's first name in Figure 15, the variable will be displayed in your response rather than the value of the variable (the contact's first name in the example). The variable is replaced with the data only when you send your response. Then, when you reopen the incident, the data appears where the variable had been inserted.

To insert standard text using a hot key sequence:

◈ **Tip** To display the hot key sequence for a standard text item, select the standard text in the left column of the Standard Text window. The keystrokes are displayed in the Hotkey field in the right column.

At the location in the incident response where you want to insert the standard text, press **F8** to open a Standard Text field, type the hot key sequence in the field, and press **F8** or **Enter** to insert the text into your response.

Adding and editing contact information

Because RightNow Service creates incidents from customer questions, the contact information is usually present when you respond to an incident. Sometimes, however, you will need to add or edit contact information. You can add multiple contacts to an incident, but you must designate only one as the primary contact. Secondary contacts do not have to be associated with the same organization as the primary contact.

To add or edit contact information:

1 Click the Contacts tab. Information for the primary contact (which includes name, email address, phone, title, and address) is displayed at the top of the tab. Nested tabs contain additional information. One tab lets you add and edit contact information. A second lets you add and edit other contact information, including contact custom fields, and the third tab displays the incident history for the contact.

Path: Right-Click Incident>Edit>Incident>Contacts

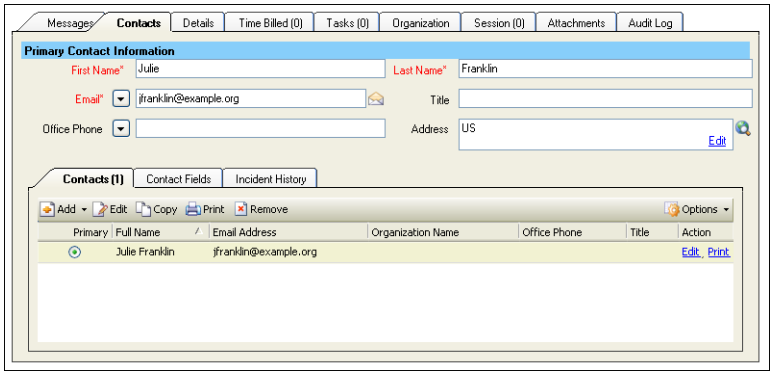


Figure 16: Contacts Tab of an Incident

2 To add a new contact to the incident, click the Add button and select Add New. The New Contact window opens.

Note You can also open the New Contact window by clicking the Search button to the right of the Contact field and then selecting the New Contact button.

Or

To add an existing contact to the incident, click the Add button and select Add Existing. The Contact Search window opens. Refer to the *RightNow 8.2 User Manual* if you need help searching for contacts.

Or

To edit a contact for the incident, right-click the contact and select Edit. A window containing the contact's information opens; the standard contact workspace contains the same fields as the New Contact window.

Path: Right-Click Incident>Edit>Incident>Contacts>Add>Add New

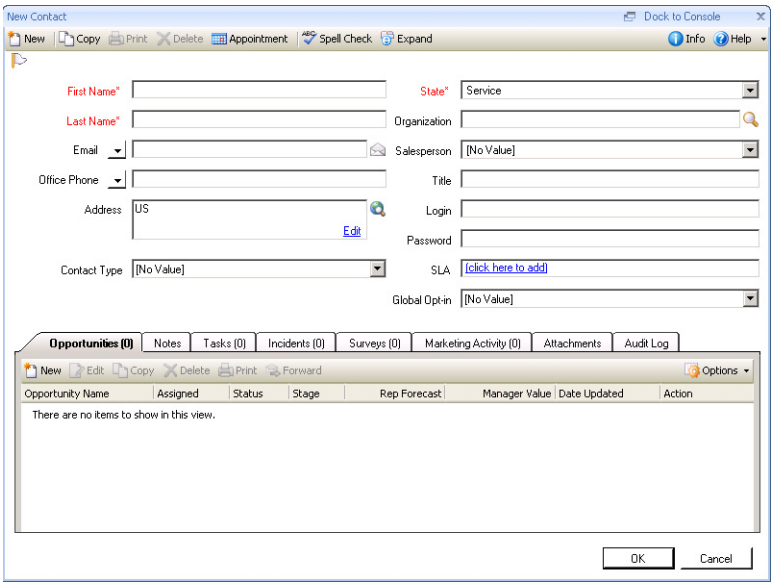


Figure 17: Adding Contact Information to an Incident

3 Add or edit contact information in the First Name and Last Name fields and make a selection in the State field.

4 To add or edit other contact information, make the changes in the fields or on the record tabs. For information about working with contacts, refer to the *RightNow 8.2 User Manual*.

5 Click the OK button to close the New Contact window.

Important Closing the New Contact window keeps the contact data in memory, but the contact record is not saved in the knowledge base until you save the incident.

6 To add other information to the primary contact record, click the Contact Fields tab.

Path: Right-Click Incident>Edit>Incident>Contacts>Contact Fields

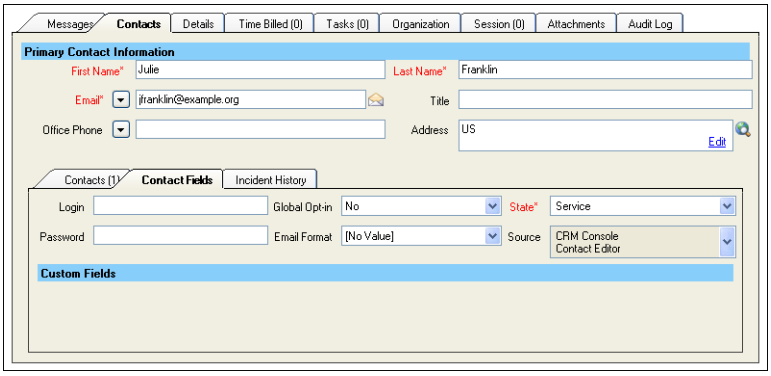


Figure 18: Contact Fields Tab on the Contacts Tab

a To add or edit the contact's login or password, type it in the field.

b To select or change the contact's global opt-in choice, email format, or state, click the appropriate drop-down menu and select an option.

7 To view incident information for the primary contact, click the Incident History tab.

Path: Right-Click Incident>Edit>Incident>Contacts>Incident History

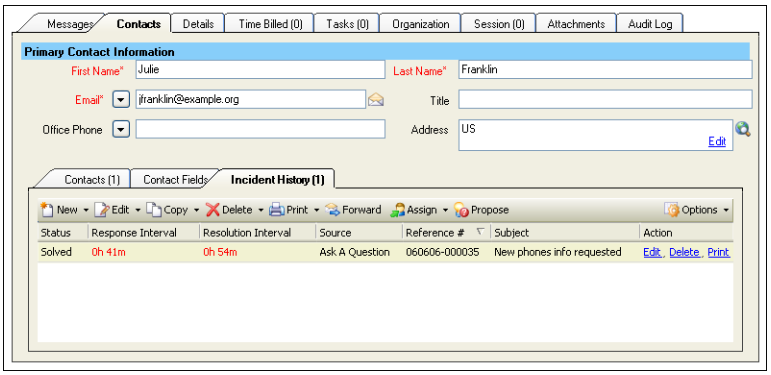


Figure 19: Incident History Tab on the Contacts Tab

8 Click the Save button on the incident toolbar to save your changes on the Contacts tab.

Tracking your time

Your organization may collect statistics on the amount of time agents spend solving incidents so that management can plan for better use of staff time. These statistics can also identify products or issues that are causing similar customer questions, allowing answers to be added to the knowledge base to reduce the amount of time agents must spend on them.

The Time Billed tab is where you enter the amount of time you spend on an incident; it also lets you see details about the amount of time other agents spent on the incident. Depending on how your RightNow administrator has configured your application, you may be required to enter time billed every time you edit an incident or before you can set an incident status to Solved.

To add time billed to an incident:

1 Right-click the incident on the content pane and select Edit>Incident.

2 Click the Time Billed tab. The tab contains the number of time billed entries associated with the incident in parentheses next to the tab name.

Path: Right-Click Incident>Edit>Incident>Time Billed

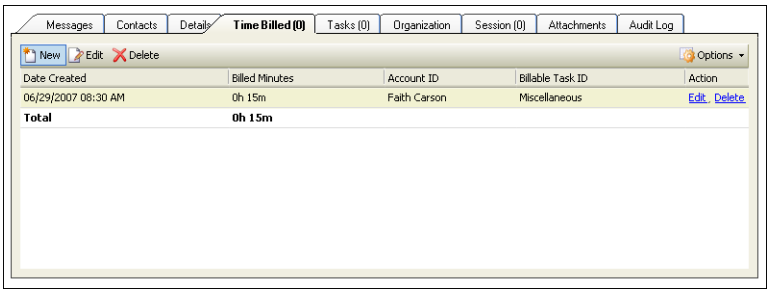


Figure 20: Time Billed Tab

3 Click the New button to open the Time Billed window.

Path: Right-Click Incident>Edit>Incident>Time Billed>New

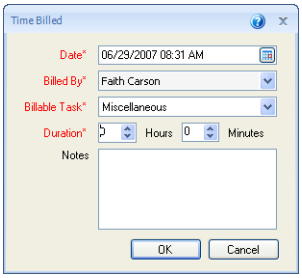


Figure 21: Adding Time Billed to an Incident

4 Enter field information described in Table 8.

Table 8: Time Billed Window Description

Field	Description
***Date**	The default is today's date. Click the drop-down menu to open the current month's calendar and select a date.
***Billed By**	Click this drop-down menu and select a staff member. This field defaults to your staff account since you are editing the incident.
***Billable Task**	The default billable task is Miscellaneous, but your RightNow administrator may have added other billable tasks for you to select. Click this drop-down menu and select a task.

Table 8: Time Billed Window Description (Continued)

Field	Description
***Duration**	Select the value in the Hours or Minutes field, or both, and type a new value. Or use the up and down arrows to adjust the duration.
Notes	Type a note about the time billed for the incident.

5 Click the OK button to close the Time Billed window.

6 Click the Save button on the incident toolbar to save your changes on the Time Billed tab.

Modifying time billed entries

You can edit and delete time billed entries as necessary. To edit a time billed entry, right-click it and select Edit. Make any changes and save the entry. To delete a time billed entry, right-click the entry and select Delete.

Important Deleting a time billed entry can result in inaccurate statistics in reports.

Adding tasks

You can add and edit all tasks associated with an incident by clicking the incident's Tasks tab. When you add or edit a task, you not only define its name, the staff member it is assigned to, relevant dates, and type of task, but you also associate it with new or existing incidents. The tab contains the number of tasks associated with the incident in parentheses next to the tab name.

Path: Right-Click Incident>Edit>Incident>Tasks

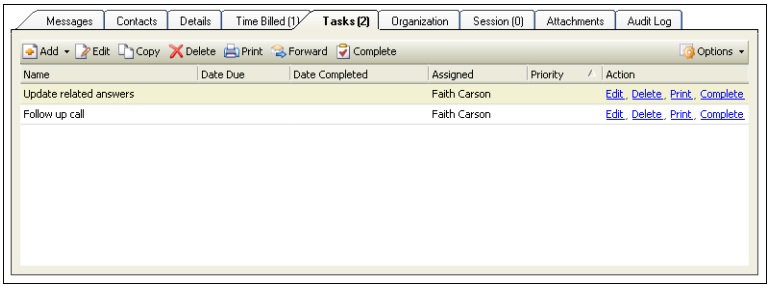


Figure 22: Tasks Tab

To add or edit a task for an incident:

1 Right-click the incident and select Edit>Incident.

2 Click the Tasks tab.

3 Click the Add button and select Add New to open the New Task window.

Or

Right-click a task on the Tasks tab and select Edit.

Note The reference number for the incident appears in the Incident field on the New Task window.

Path: Right-Click Incident>Edit>Incident>Tasks>Add>Add New

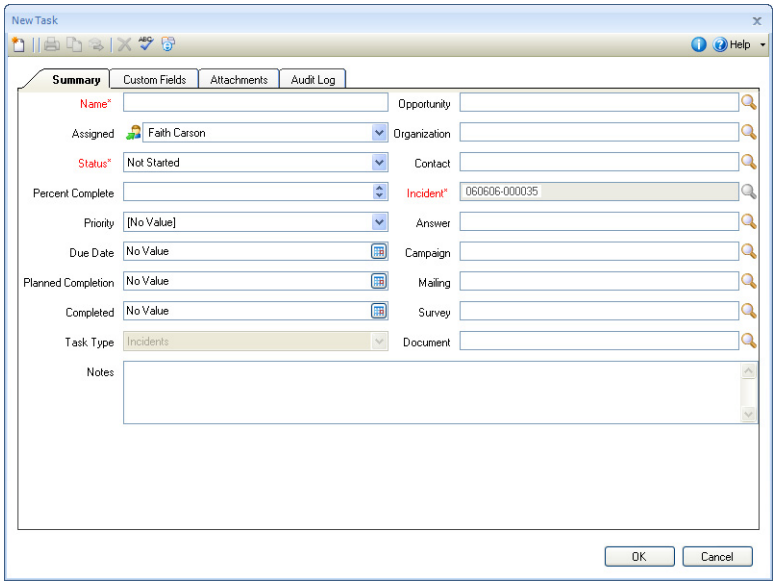


Figure 23: Adding a Task to an Incident

4 Type the task name in the Name field.

5 Click the Status drop-down menu and select a status for the task. The default status is Not Started.

6 To enter additional task information, complete the fields or select menu options. For detailed information about adding and editing tasks, refer to the *RightNow 8.2 User Manual*.

7 Click the OK button to save the task and close the New Task window.

8 Click the Save button on the incident toolbar to save your changes on the Tasks tab.

Adding organizations

You can view and edit an organization associated with an incident (depending on the properties of the organization field on your workspace) by clicking the incident's Organization tab, which contains nested tabs for the organization's custom fields, incident history, and contacts associated with the organization. For more information about working with organizations, refer to the *RightNow 8.2 User Manual*.

Note The default property for the organization field on the standard incident workspace is set to read only and is not a required field. If the property is set so that the field can be edited on the incident workspace, it will also be set to be required.

To add or edit an organization for an incident:

1 Right-click the incident and select Edit>Incident.

2 Click the Organization tab.

Path: Right-Click Incident>Edit>Incident>Organization

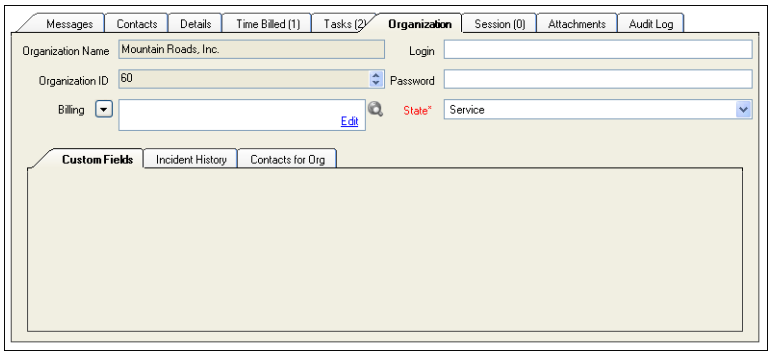


Figure 24: Organization Tab

3 To add or edit the organization name, type the name in the field.

Important If you change the organization name on the tab and save it, the name changes throughout the knowledge base.

4 To enter an address, click the drop-down arrow to the left of the field, select the type of address, and click Edit in the field to open a window for entering the organization's address. The default address types are Billing and Shipping, and your RightNow administrator may have added others. Type the address in the fields on the window.

5 To enter a login or password, type the information in the appropriate field.

6 To change the organization's state, click the drop-down menu and select an option.

7 Enter any organization custom fields on the Custom Fields tab.

8 To view the incident history for the organization, click the Incident History tab.

9 To view the organization's contacts, click the Contacts for Org tab.

10 Click the Save button on the incident toolbar to save your changes on the Organization tab.

Viewing the Session tab

You might find it helpful to know what information contacts viewed on the end-user interface before they submitted their question. On the Session tab of an incident, you can see what questions they viewed and any searches they performed.

To view session information for an incident:

1 Right-click the incident and select Edit>Incident.

2 Click the Session tab. The number of actions are listed in parentheses on the tab.

Path: Right-Click Incident>Edit>Incident>Session

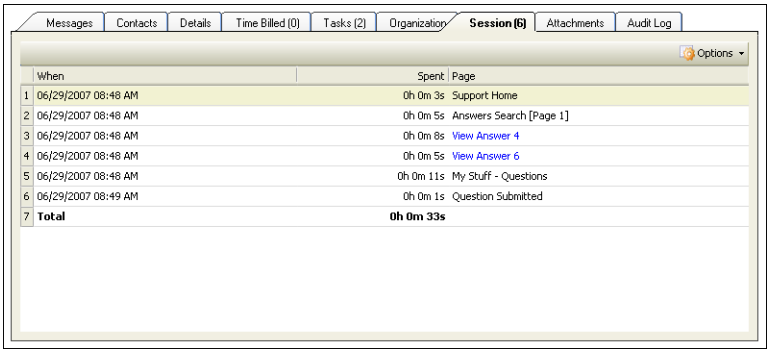

Messages
Contacts
Details
Time Billed (0)
Tasks (2)
Organization
Session (6)
Attachments
Audit Log
Options
When
Spent
Page
1 06/29/2007 08:48 AM 0h 0m 3s Support Home
2 06/29/2007 08:48 AM 0h 0m 5s Answers Search [Page 1]
3 06/29/2007 08:48 AM 0h 0m 8s View Answer 4
4 06/29/2007 08:48 AM 0h 0m 5s View Answer 6
5 06/29/2007 08:48 AM 0h 0m 11s My Stuff - Questions
6 06/29/2007 08:49 AM 0h 0m 1s Question Submitted
7 Total 0h 0m 33s

Figure 25: Session Tab

Attaching files to incidents

The Attachments tab lets you add files that may not fit neatly into an incident. For example, you might want to attach a file that contains graphic elements. When you attach a file to an incident, that file becomes permanently attached to the incident. Likewise, any file the customer attaches when submitting a question also becomes permanently attached to the incident. Files that are permanently attached to an incident are not sent in your response to the customer. Instead, you and other staff members can access the file from the Attachments tab of the incident, while the customer can access it from the My Stuff page on the end-user interface. As a result, email is sent more quickly because the file is not included in the transmission, and files are kept in a single location for reference. The procedure in this section describes how to permanently attach a file to an incident.

Note You can also attach a file to your email response. In contrast to a file you attach to an incident, the email file attachment is attached to that message only and is not stored with the incident. This lets the customer open the file directly from the email client instead of having to log in to view it. For information about attaching a file to your response but not to the incident itself, refer to "To attach files to an incident response:" on page 66.

The Attachments tab lists any files attached to the incident and contains the file name, size, content type, and description. Table 9 describes the buttons on the Attachments tab.

Table 9: Attachments Tab Toolbar Description

Button	Description
	Click this button and select Browse or Search.
Browse	Click this button to open a window that lets you view the files and folders on your workstation and select one or more to upload and attach to the record. For information, refer to "To browse for a file to attach to an incident:" on page 57.
Search	Click this button to open the File Search window so you can specify a directory, all or part of a file name, and type of file. The files that match these criteria are displayed so you can select the ones you want to upload and attach to the record. For information, refer to "To search for a file to attach to an incident:" on page 59.
	Click this button to open the file for viewing.

Table 9: Attachments Tab Toolbar Description (Continued)

Button	Description
	Click this button to open the File Transfer window, which displays download progress.
	Click this button to open the Attachment Properties window and add or edit the following fields.
File Name	Type the file name.
Display Name	Type a display name that appears in the Name column of the Attachments tab.
Description	Type a description that appears in the Description column of the Attachments tab.
	Click this button to remove the selected file attachment from the record.

When you want to attach a file to an incident, you can locate the file by browsing or searching. The following procedures describe each method.

Note You can attach an unlimited number of files to an incident, but each file can be no larger than 20 megabytes. Contact your RightNow administrator to learn if additional file size limitations exist on your system.

To browse for a file to attach to an incident:

1 Click the Attachments tab.

Path: Right-Click Incident>Edit>Attachments

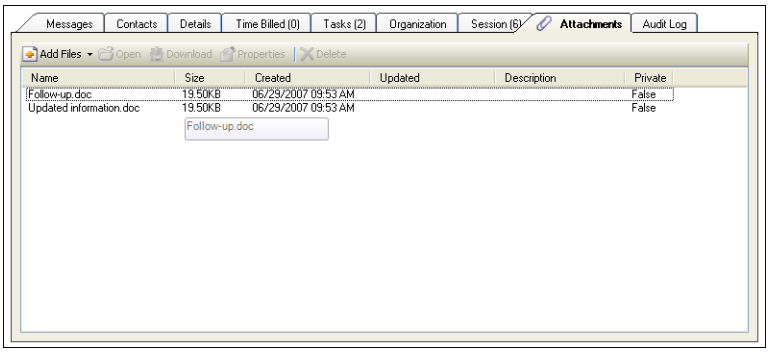


Figure 26: Attachments Tab

2 Click the Add Files button and select Browse. A window opens and displays the files and folders on your workstation.

Path: Attachments>Add Files>Browse

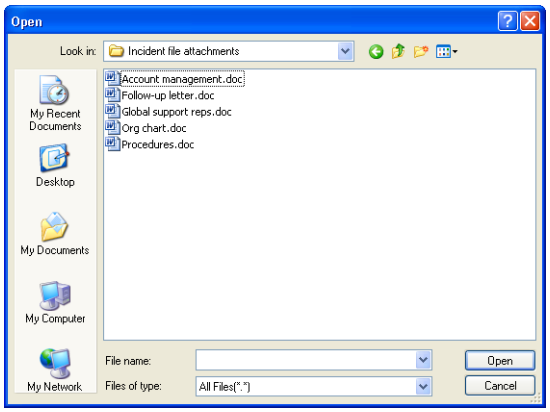


Figure 27: Browsing for Files to Attach to an Incident

3 Select the file to attach.

4 To attach additional files, press **Ctrl** while selecting the files.

5 Click the Open button to attach the file to the incident.

To search for a file to attach to an incident:

1 Click the Attachments tab.

2 Click the Add Files button and select Search to open the File Search window.

Path: Attachments>Add Files>Search

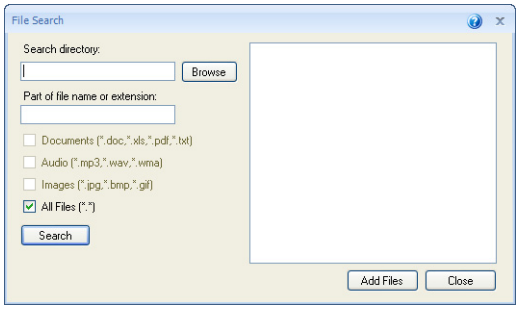


Figure 28: Searching for Files to Attach to an Incident

3 Enter any or all of the field information described in Table 10.

Table 10: File Search Window Description

Field/Button	Description
Search directory	Type the name of the directory where you want to search for the file or click Browse.
Browse	Click this button to display the file structure and make a selection from the list of available directories.
Part of file name or extension	Type all or part of the file name. **Note:** This field uses an implicit wildcard at the end of the entry.
Filters	Select a filtering option to narrow the search.
Documents (*.doc, *.xls, *.pdf, *.txt)	Select this check box to search for document files.
Audio (*.mp3, *.wav, *.wma)	Select this check box to search for audio files.
Images (*.jpg, *.bmp, *.gif)	Select this check box to search for graphics files.

Table 10: File Search Window Description (Continued)

Field/Button	Description
All Files (*.*)	Select this check box if you do not want to restrict the search by file type.
Search	Click this button to start the search after you have defined the search criteria. While file searching is in progress, the button changes to Stop; click it to stop searching when the file you want is displayed.
Add Files	Click this button to open the File Upload window, which displays a progress indicator and a Stop button for each file you upload. If a problem occurs, click the error to view details.

4 Click the Search button to display a list of files that meet the search criteria.

5 Click a file to select it for uploading.

6 To attach additional files to the incident, press **Ctrl** while selecting the files.

7 Click the Add Files button to upload the selected file and attach it to the incident.

8 Click the Close button to close the File Search window.

Presenting offers to customers

In your role as an agent, your organization may ask you to present special offers to customers because you have a strong understanding of what they need and have earned their trust through your work with them.

When you work with an incident, RightNow Service evaluates the customer's information and purchase history. Based on the results, it looks for offers the customer is eligible for. These offers can include promotions, suggestions, or both. Promotions are special offers made to specific groups of customers (called targets), while suggestions are automatically generated based on customer information. An example of a promotion is free shipping on certain products. An example of a suggestion is offering a headset to someone who has recently purchased a cell phone.

When the customer is eligible for an offer, the Offer Advisor button is enabled. After you finish responding to the customer's question, you can click the Offer Advisor button on the incident toolbar to display an Offers window, which resembles the one in Figure 29.

Path: Right-Click Incident>Edit>Incident>Offer Advisor

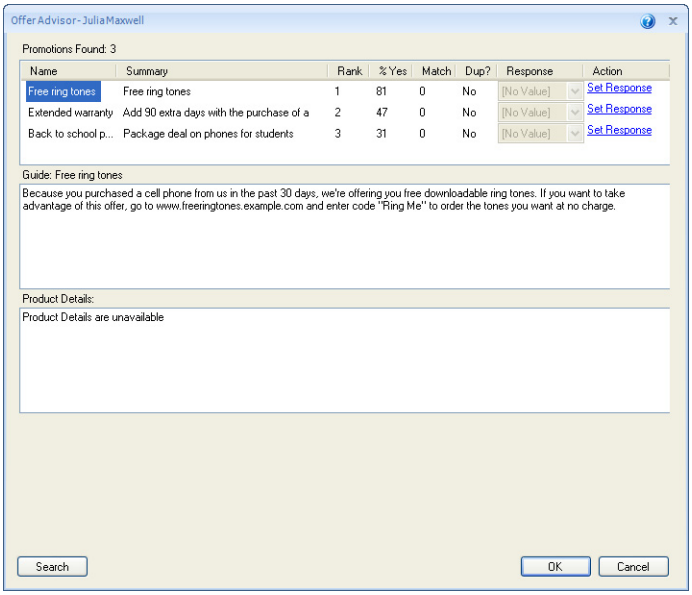


Figure 29: Offer Advisor Window

The following procedure is a brief overview of presenting an offer to a customer. For the complete procedure, refer to "Presenting offers" on page 291.

To present an offer:

1 From an open incident, click the Offer Advisor button to open the Offer Advisor window.

2 Select the offer you want to present to the customer.

3 If you are on a phone call with the customer, read or paraphrase the guide and product information to the customer.

Or

If you are responding to an incident, right-click anywhere in the guide text or product information sections and select Copy. Paste the text into the response and modify as necessary before sending.

4 Click Set Response in the Action column for the offer you want to present. The associated drop-down menu in the Response column is activated.

5 Click the drop-down menu and select Yes, Interest, No, or Defer.

6 Click the OK button to return to the incident.

7 Click the Save and Close button to save the incident and record the customer's responses to the offers.

Creating opportunities from incidents

During the course of working with customers, you might discover information that makes them potential customers for other services and products your organization offers. In those cases, you can create opportunities and send them to the sales department for follow-up.

Note Figure 30 is an example of the standard service opportunity window. The workspace you use to create an opportunity from an incident may be different depending on your profile and any custom workspaces defined by your RightNow administrator.

To create an opportunity from an incident:

1 From an open incident, click the New Opportunity button.

Note The New Opportunity button is not part of the standard incident workspace, so it appears on the incident toolbar only if your RightNow administrator has added it.

Path: Right-Click Incident>Edit>Incident>New Opportunity

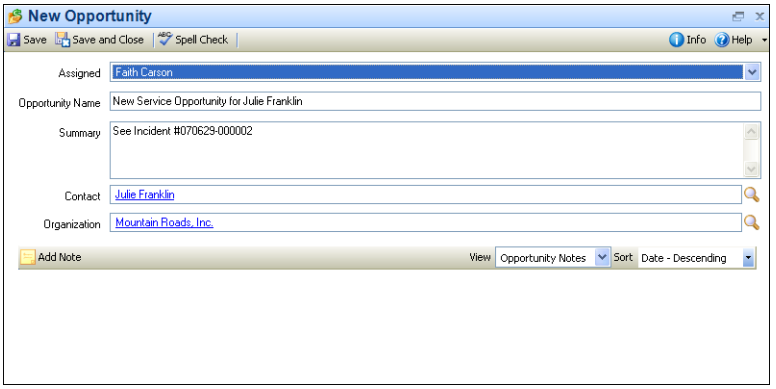


Figure 30: Creating an Opportunity from an Incident

2 To edit any information for the opportunity, enter field information described in Table 11.

Table 11: New Opportunity Window Description

Field	Description
Assigned	Click this drop-down menu and select a staff member the incident is assigned to. Your name appears by default when you add an opportunity using the standard service opportunity workspace.
Opportunity Name	Type a name for the opportunity in this field. The default value is "New Service Opportunity for [Contact Name]."
Summary	Type information about the incident or contact in this field. The default value is "See Incident # _____."
Contact	Click the Search button for the Contact field to search for a different contact to add to the opportunity.
Organization	Click the Search button for the Organization field to search for an organization to add to the opportunity.
Add Note	Click the Add Note button and type a note in the field.

3 Click the Save and Close button to send the opportunity to the sales department.

Sending responses

When you have completed a response to an incident, you are ready to send your reply to the customer. Several options are available when you send a response, including copying other recipients, selecting encryption options, and attaching files to the response.

The behavior for sending responses depends on the settings your RightNow administrator selected when creating the incident workspace for your profile. The standard incident workspace behaves in the following manner when you select response options.

- The Send on Save check box is cleared, so you must select it if you want to automatically send your response to the primary contact when you save the incident. You might not want to select it until you have finalized your response so you do not send a response each time you save changes while you work on the incident.
- If you want to send the response to other recipients, click the slider bar on the left edge of the Messages tab to automatically select the Send on Save check box and display response options, including additional recipients.

To send a response to the primary contact:

1 Select the Send on Save check box.

2 Click the Save and Close button to send your response.

To select additional recipients for an incident response:

1 Select the Send on Save check box.

2 Click the slider bar on the left side of the Messages tab. The tab expands to display response options.

Path: Click Slider Bar

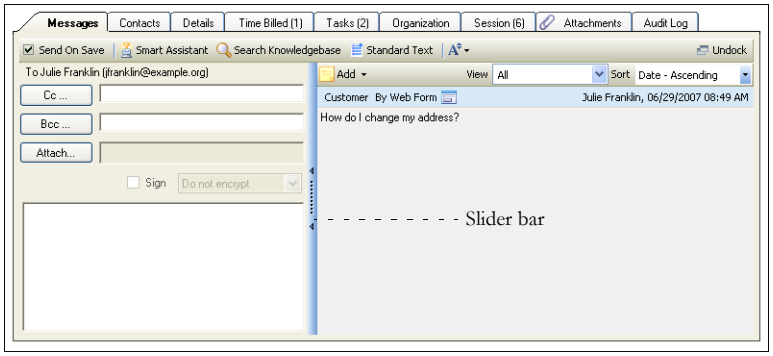


Figure 31: Options for Sending a Response

3 Click the Cc or Bcc button to open the Select Names window.

Path: Messages>Send on Save>Cc

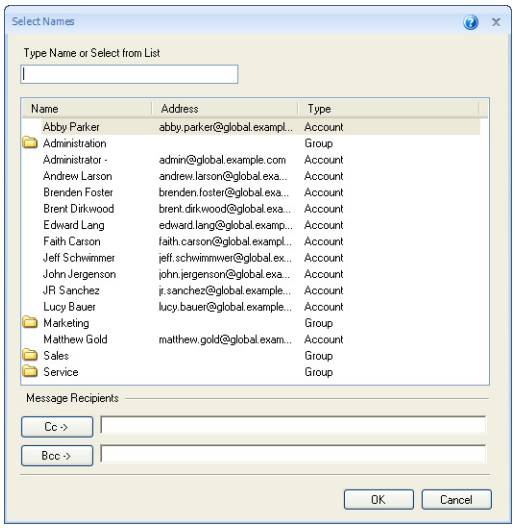


Figure 32: Selecting Recipients for an Incident Response

a Select a name from the list.

b Click the Cc button to list the name in the Cc field or the Bcc button to list the name in the Bcc field.

Note Names or addresses in the Cc field are visible to all recipients of the response; names in the Bcc field are not visible to other recipients.

---

c Click the OK button to close the Select Names window.

4 Click the Save and Close button to send the response to the customer as well as any other recipients you added to the Cc or Bcc fields.

Note Depending on how your RightNow administrator configured your system, the incident status may change to Solved when you save the incident. The incident assignment may also change to your name if the incident was previously assigned to another staff member.

To sign and encrypt an incident response:

Note You cannot select the Sign check box under the S/MIME heading if the RightNow Service mailbox does not have a certificate that allows sending encrypted email. Nor can you select an encryption option if the contact you are responding to does not have a certificate that allows receiving encrypted email. If you select Encrypt Always, you can select only addresses that have certificates associated with them.

1 Select the Send on Save check box.

2 Click the slider bar on the left side of the Messages tab to display response options.

3 Select the Sign check box.

4 To encrypt your response to the contact, click the Do Not Encrypt drop-down menu and select Encrypt When Possible or Encrypt Always.

To attach files to an incident response:

1 Select the Send on Save check box.

2 Click the slider bar on the left side of the Messages tab to display response options.

3 Click the Attach button to open the Attachments window.

Path: Click Slider Bar>Attach

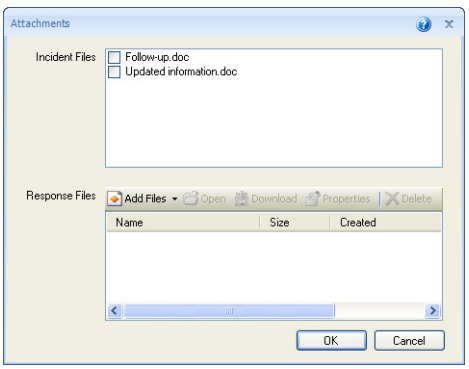


Figure 33: Attaching Files to an Incident Response

4 To send the response with one or more files that are permanently attached to the incident, select the associated check boxes in the Incident Files section of the Attachments window.

5 To attach additional files to the incident response, click the Add Files button and select Browse to open a window that lets you view the files and folders on your workstation. Or select Search to open the File Search window.

a If you selected Browse, select the file and click the Open button to attach it to the response.

b If you selected Search, specify a directory, all or part of a file name, and the type of file. Click the Search button. Then select one or more of the matching files and click the Add Files button to upload the selected file and attach it to the response.

Note Response files are not attached to the incident, but are sent only one time with the response. Customers can click the link in the email to open the file.

In contrast to response files, incident files are associated with an incident using the procedures described in "Attaching files to incidents" on page 56. These files are not sent with the response (unless you specify that they be sent), but can be opened by the customer from the My Questions page after logging in to My Stuff.

Adding incidents

Incidents are generally submitted by customers from the Ask a Question page or through email. As a result, the majority of your time is probably spent editing incidents. However, RightNow Service does not automatically create incidents when customers contact you by phone, mail, or fax, so you may find yourself adding incidents from time to time. When you add an incident, you create a record of both the customer's question and your response, which can help your organization track the resolution of incidents.

◈ **Tip** You can add incidents to your knowledge base no matter what navigation list is active or what kind of record you are working on.

To add an incident:

1 Click New and select Incident.

Path: New>Incident

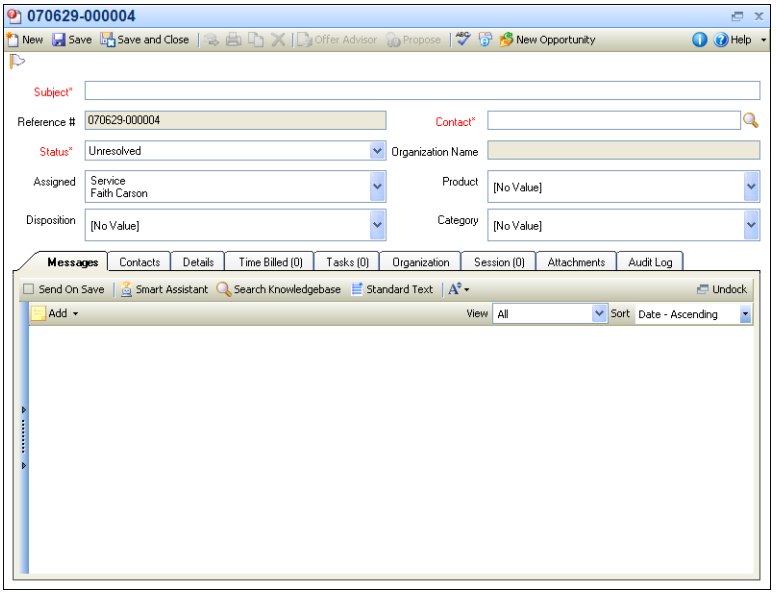


Figure 34: Adding an Incident

2 Type the complete question or issue in the Subject field, to a maximum of 240 characters.

3 Complete the incident fields as described in "Editing key incident fields" on page 32.

4 Click the Add button and select Customer Entry.

5 Type the customer's question in the text field.

6 Click the Add button and select Response.

7 Type your response. For information about responding to an incident, refer to "Adding responses" on page 35 and "Adding content to the response" on page 39.

8 To add or edit contact information for the incident, click the Contacts tab and complete the information as described in "Adding and editing contact information" on page 47.

9 To enter the time you spend working on the incident, click the Time Billed tab and complete the information as described in "Tracking your time" on page 50.

10 To add or edit task information for the incident, click the Tasks tab and complete the information as described in "Adding tasks" on page 52.

11 To add or edit organization information for the incident, click the Organization tab and complete the information as described in "Adding organizations" on page 54.

12 To attach one or more files to the incident, click the Attachments tab and complete the information as described in "Attaching files to incidents" on page 56.

13 To present an offer to the customer, click the Offer Advisor button. Refer to "Presenting offers to customers" on page 60.

14 To create an opportunity from the incident, click the New Opportunity button. Refer to "Creating opportunities from incidents" on page 62.

15 To send a response, refer to "Sending responses" on page 63.

16 Click the Save and Close button to save the incident.

Managing incidents

Besides editing and adding incidents, you may have other incident management duties as well. For example, you might want to forward incidents to others within or outside your organization, propose that incidents be added as answers to the knowledge base, delete incidents, make the same change to multiple incidents, or re-queue or reassign incidents. This section describes the procedures to perform these tasks.

Forwarding incidents

As described in "Sending responses" on page 63, you can send a copy of an incident to other recipients when you reply to the customer. You might, however, want to send the incident before or after sending a response to the customer. In those cases, you can forward the incident to the selected recipients. For example, your manager may want to see all incidents related to a particular question or issue, or you might want another staff member to review your response before sending it to the customer.

You can also forward any files that are permanently attached to the incident, send response files with the forwarded incident, and exclude notes in the incident thread from being sent to the recipient. Additionally, you can forward an incident using the Cc and Bcc fields.

Note The Forward button is not enabled until after you have saved an incident you are adding.

To forward an incident:

1 Right-click the incident in an incidents report and select Forward.

Or

With the incident open, click the Forward button.

Path: Right-Click Incident>Forward

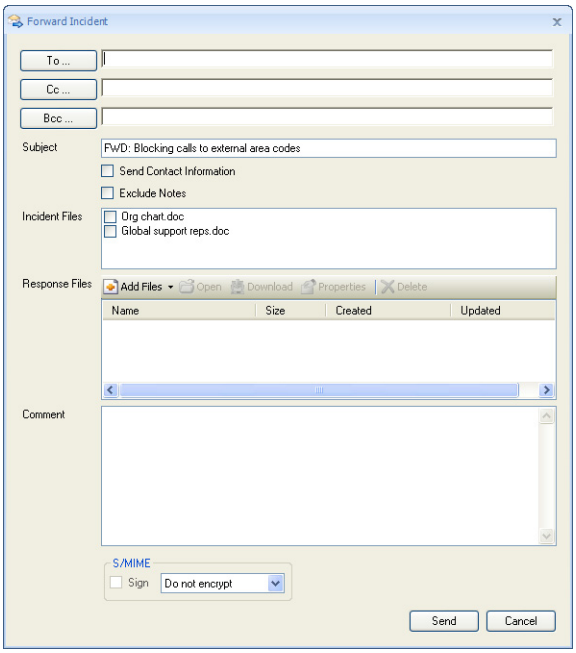


Figure 35: Forwarding an Incident

2 Enter field information described in Table 12.

Table 12: Forward Incident Window Description

Field/Button	Description
To ...	Click this button to open the Select Names window. Select the name of the recipient and click the To button to insert the name in the field. (To select additional recipients, press **Ctrl** while making your selections.) After selecting the recipient, click the OK button on the Select Names window. **Note:** You can also type the email address of the recipient in the text field.
Cc ...	Click this button to open the Select Names window, select the recipient's name, and click the Cc button. **Note:** All recipients will be able to see the email addresses in the Cc field.

Table 12: Forward Incident Window Description (Continued)

Field/Button	Description
Bcc ...	Click this button to open the Select Names window, select the recipient's name, and click the Bcc button. **Note:** No recipients will be able to see the email addresses in the Bcc field.
Subject	The incident's subject appears in this field; you can edit it if necessary.
Send Contact Information	Select this check box to send the primary contact information with the incident. The information that is sent includes the contact's email address, first and last names, contact type, title, any phone numbers that have been entered, and any custom field information.
Exclude Notes	Select this check box to exclude any notes in the incident thread from being forwarded with the incident.
Incident Files	Files that are attached to the incident are listed in this field. Select the check box next to any file you want to forward with the incident. To attach files to an incident on the Attachments tab, refer to "Attaching files to incidents" on page 56.
Response Files	Click the Add Files button and select Browse or Search. Refer to "Attaching files to incidents" on page 56.
Comment	Type any comments you want to forward with the incident in this field.
S/MIME	Select one or both of the security options under S/MIME.
Sign	Select this check box to sign the email with the mailbox's signature. **Note:** The Sign check box is disabled if the RightNow Service mailbox does not have S/MIME security enabled.
Do not encrypt	Click this drop-down menu and select one of the encryption options: Do Not Encrypt, Encrypt When Possible, and Always Encrypt.

3 Click the Send button to forward the incident and any selected files to the recipients.

Proposing answers

Sometimes a customer's question is common enough that you believe other customers should also have access to the answer. If you believe this information belongs in the knowledge base, you can propose the incident as a potential answer that customers can view without needing to submit an incident. This helps the knowledge base stay current with the information customers need.

When you propose an incident as an answer, a copy of the incident is submitted to a knowledge engineer, who determines whether it should become an answer. If it should, the knowledge engineer first defines an answer access level, answer status, language, and visibility, and then publishes the answer.

Note Incident custom fields may or may not be included when you propose an incident as an answer. If you propose an incident from an incidents report, by either right-clicking the incident and selecting Propose or by clicking the Propose button on the report's ribbon, the incident custom fields are not added to the Notes tab on the Propose Incident for Answer window. If, however, you click the Propose button from an open incident, the custom fields do appear on the Propose Incident for Answer window.

To propose an answer from an incident:

1 Right-click the incident on the content pane and select Propose.

Or

With the incident open, click the Propose button.

The Propose Incident for Answer window opens.

Path: Right-Click Incident>Propose

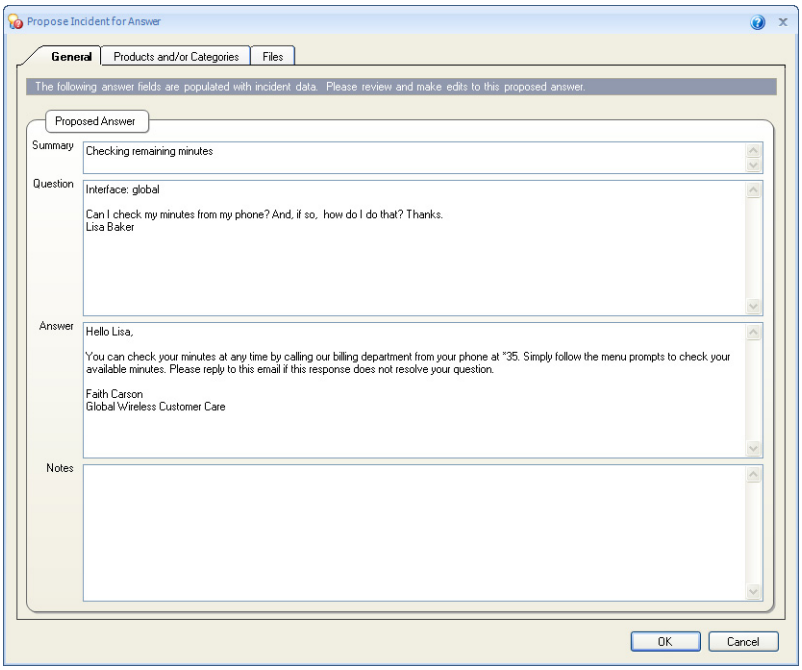

Propose Incident for Answer
General
Products and/or Categories
Files
The following answer fields are populated with incident data. Please review and make edits to this proposed answer.
Proposed Answer
Summary
Checking remaining minutes
Question
Interface: global
Can I check my minutes from my phone? And, if so, how do I do that? Thanks.
Lisa Baker
Answer
Hello Lisa,
You can check your minutes at any time by calling our billing department from your phone at *35. Simply follow the menu prompts to check your available minutes. Please reply to this email if this response does not resolve your question.
Faith Carson
Global Wireless Customer Care
Notes
OK
Cancel

Figure 36: Proposing an Incident for an Answer

2 Review the proposed answer and make any necessary edits.

3 To add a note to the incident, click in the Notes field and type your comments.

4 To add or remove any products or categories associated with the proposed answer, click the Products and/or Categories tab. Select those you want to associate with the proposed answer, and clear those you do not want to associate with the answer.

Note The products and categories associated with the incident are selected by default.

---

5 To add any files that are permanently attached to the incident to the proposed answer, click the Files tab. Select the check box next to any file you want to propose with the incident.

6 Click the OK button to submit the incident as a proposed answer. A confirmation message lets you know that an answer was proposed from the incident.

Path: Right-Click Incident>Propose>OK

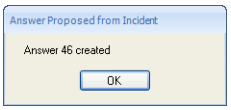


Figure 37: Answer Proposed from Incident Window

Deleting incidents

If your profile gives you permission to delete incidents, the Delete button is enabled on the toolbar. When you delete an incident, you permanently remove it from the knowledge base.

To delete an incident:

1 To delete an incident when the incident is open, press the Delete button. A message asks you to confirm deletion of the incident.

Or

To delete an incident from an incidents report, right-click the incident and select Delete>Incident.

2 Click the Yes button to delete the incident.

Updating multiple incidents

RightNow Service allows you to update, forward, propose, and delete multiple incidents at one time rather than performing the same action on each incident individually. This feature saves you time when you have several incidents that pertain to the same issue, product, or question.

For example, suppose your organization has recently released a new product and you have received a large number of emails regarding it; you can write a single response that lets you reply to all the incidents at once. Or you might want to reassign all your open incidents to another agent when you leave for the day.

To update multiple incidents:

1 Press **Ctrl** while selecting each incident from an open incidents report on the content pane.

Note Remember, you can specify unique criteria to search for all incidents you want to update. Refer to "Searching for incidents" on page 27.

2 Click the Edit button on the report ribbon.

Note Figure 38 shows the standard workspace for working with multiple incidents. Your workspace may be different if your RightNow administrator configured a custom workspace for working with multiple incidents.

Path: Ctrl+Select Incidents>Edit

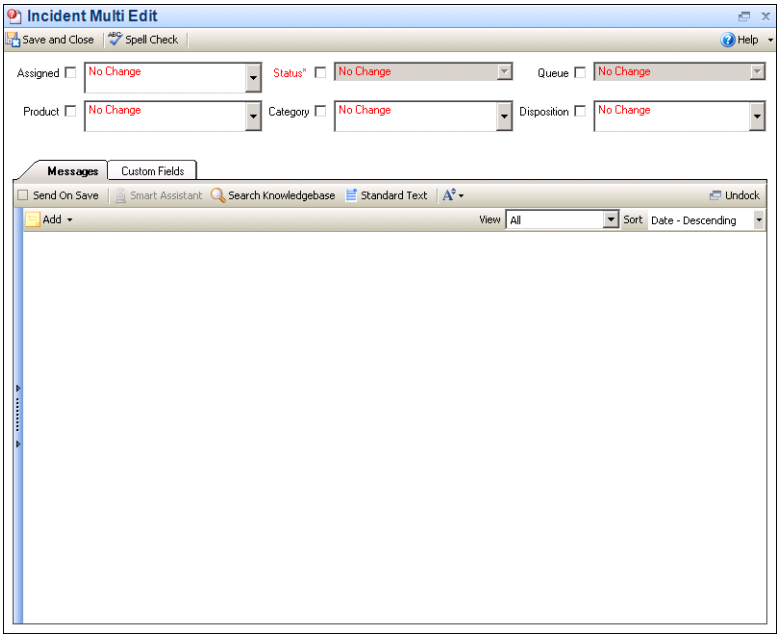


Figure 38: Updating Multiple Incidents

3 To change a field for all selected incidents, select the check box next to the field and make a selection from the drop-down menu.

4 To change information on the Messages tab, add a response or note, insert standard text, search the knowledge base, or change the text size.

5 Click the Save and Close button to update and close the edited incidents.

Note S/MIME signing and encryption of responses are disabled when you edit multiple incidents simultaneously.

To forward multiple incidents:

1 Press **Ctrl** while selecting each incident on the content pane that you want to forward.

2 Click the Forward button on the report ribbon.

3 Follow the procedure for forwarding single incidents as described in "Forwarding incidents" on page 70.

Note All of the files attached to all of the incidents you selected appear in Incident Files. Select the check box for every file attachment you want to forward with the associated incident. Recipients receive individual emails for each incident you forward; if an incident has file attachments and you selected the check boxes for those attachments, the forwarded incident contains the attachments.

To delete multiple incidents:

Caution Any incidents you delete are permanently removed from the knowledge base.

1 Press **Ctrl** while selecting each incident on the content pane that you want to delete.

2 Click the Delete button on the report ribbon.

3 Click the Yes button in response to the confirmation message.

Re-queuing and reassigning incidents

You might need to manually move incidents from your inbox back into a queue or assign them to another staff member. The following situations commonly require you to move incidents; your manager may have other guidelines as well.

- **You log out for the day**—To avoid having unresolved incidents sitting in your inbox when you leave for the day, you might want to place them back in a queue or assign them to another staff member.
- **You are assigned an incident you should not have received**—When an incident is incorrectly assigned, you or your manager can move it to the correct queue or assign it to another agent or group.

To re-queue or reassign an incident:

1 Right-click the incident on the content pane and select Edit>Incident.

2 Click the Details tab.

3 Click the Queue drop-down menu and select the appropriate queue.

Or

Click the Assigned drop-down menu and select the appropriate group or staff member.

4 Click the Save and Close button to re-queue or reassign the incident. The incident is moved from your inbox to the selected queue or agent inbox.

◈ **Tip** For information on re-queuing and reassigning multiple incidents at once, refer to "Updating multiple incidents" on page 75.

3

Answers

Customers use your site to find answers to their questions about the services and products your organization provides. To assist your customers in finding the information they are looking for, you can create answers to common questions and post them on your end-user interface. As a result, you will be able to provide a greater customer experience because your customers will be able to quickly find the answers to their questions.

RightNow Service provides you with the tools for creating and publishing effective answers. You can format answers to include links, tables, graphics, and other features, making your support site more interactive and visually appealing. In addition, RightNow Service provides you with a revolutionary method of knowledge base management that enables you to overcome the critical problems associated with a manually constructed knowledge base. Maintenance of your knowledge base is minimized because of automated processes that learn from customers using your site, then automatically rank answers and display the most useful answers first.

In this chapter

- **Seeding your knowledge base**—Describes how to establish processes for publishing answers, including how to create effective answers and how to control answer visibility to your customers. Refer to page 80.
- **Organizing answers**—Describes how you can manually or automatically organize answers displayed on the end-user interface. Answers can be ranked and arranged by implicit and explicit feedback. Refer to page 86.
- **Maintaining your knowledge base**—Describes methods for maintaining your knowledge base for optimum customer support, including evaluating customer tracking and feedback, answer aging, and service analytics. Refer to page 89.
- **Overview of answers**—Provides an overview of the standard answer workspace, answer toolbar, information fields, and record tabs. Refer to page 92.
- **Searching for answers**—Contains procedures to search for and open answers. Refer to page 101.
- **Managing answers**—Contains procedures for creating and publishing answers to your knowledge base. Also includes procedures for editing answers, managing answer relationships, and the advanced options available when working with answers. Refer to page 107.

Seeding your knowledge base

RightNow Service's ability to start with only fifteen to twenty answers eliminates the need for a comprehensive initial knowledge set, which significantly speeds and simplifies the implementation. Most organizations can build their initial seed from existing online questions and answers, documents, or customer support interactions. Instead of constructing a complete set of answers up front, you can take advantage of the ongoing questions that your customers submit to capture real-world issues.

As customers submit questions and your organization's support staff solves these issues, you will be supplied with content that is perfectly suited for public answers. RightNow Service's Propose Answer feature enables agents to suggest that certain incidents become public answers, allowing you to seamlessly create public answers from the real issues that your customers are facing. This method of organic growth eliminates the need for a complete initial group of answers, significantly reducing your ongoing maintenance tasks, and ensures that your knowledge base contains useful, effective content. Additionally, as you foresee that upcoming events (for example, a product release, seminar, or conference) may increase queries on your site, you can manually add answers to the knowledge base to answer questions before they are even asked.

Defining a process for publishing and reviewing answers

Before you develop your knowledge base, it is important to understand the process for publishing answers. Frequently, the need for a new public answer will arise from a question submitted by a customer. When agents resolve an issue and recognize the need for an answer, they can propose an incident to become a publicly viewable answer. The following process outlines the steps for efficiently capturing incident information and creating answers.

Step 1 Define a process for proposing new answers—Typically, in order to publish an incident as an answer, the incident threads will need to be summarized to cover a broader topic scope.

To take advantage of agents' expertise, we have found the following approach to be successful.

1 An agent modifies the existing incident and writes the new answer as a Note thread with the public audience in mind, following established standards and guidelines. Two key items to include are the incident reference number and the staff member's name.

2 An agent proposes the incident. An answer is created, and the summary and threads from the existing incident are copied to the Question field of the new answer.

3 You then review, edit, and format the proposed answer and publish it. This method uses an agent's knowledge for writing the bulk of the answer, and then you prepare the answer for public viewing.

Step 2 Define an approval review process for new answers—Once an answer has been proposed for public use, you may want managers or staff members from other areas in your organization to review the information to ensure technical accuracy of the methods and procedures defined in the solution.

Step 3 Determine the audience of new answers—Before publishing an answer, determine which interfaces and customers you want to be able to view the answer. You can control this visibility through the visibility of answer statuses, answer access levels, languages, products, categories, and conditional sections. For more information, refer to "Controlling answer visibility" on page 83.

Step 4 Determine the display position of new answers—You can set the position of a new answer relative to other answers on the Find Answers page on the end-user interface. When adding or editing an answer, you can choose to place new answers at the top, middle, or bottom of the answers list, or fix them at the top, middle, or bottom.

If you want to give added visibility to newly published answers, place them at the top and then allow their historical usefulness to dictate their future placement. In this way, your customers will be aware of new answers as you publish them.

Step 5 Notify staff of new answers—Your RightNow administrator can create a custom report that shows the recently published answers and subscribe you and other staff members to receive the report on a regular basis. You will be kept up-to-date on new issues and the growth of the knowledge base.

After following these steps to identify your process for publishing answers to your customers, you can begin creating answers. The following section describes how you can create effective, useful answers for your customers.

Creating effective answers

Creating useful answers is a straightforward process with a few simple guidelines. By following these guidelines, you will enhance the search process for customers, allowing them to find pertinent information quickly without needing to do multiple searches. A knowledge base containing well-crafted answers will also optimize the self-learning features of RightNow Service that continually index, group, link, and rank the answers in the knowledge base. These self-learning features are the backbone of self-service, enabling you to present the most his-

torically useful answers first, to suggest answers related to the customer's current question, and to group similar answers for presentation in the Browse feature. In addition, effective answers will make your maintenance tasks easier as information ages and changes.

Use the following guidelines to create clear, focused answers:

- **Create one-topic answers**—Think of each public answer in your knowledge base as one topic or the answer to one question. When a customer comes to your site with a question, they want quick resolution. One-topic answers improve searching and grouping, which enable customers to easily find answers. One-topic answers provide brief, pertinent information without clutter. A knowledge base of unique answers also simplifies management and maintenance.
- **Provide adequate detail**—Because RightNow Service indexes the text of the Summary, Question, and Answer fields into words and phrases for text searching and answer grouping, answers should contain an adequate amount of text that explains the issue. With limited text, there will be very few indexed words for the answer, and the words that are indexed cannot fully represent the context of the answer. As a result, the answer may be difficult to find during text searching. With too much text (over two pages), you run the risk of writing about several topics and covering too broad of a context. The resulting set of indexed words may not span the entire text of the answer. In effect, the answer can be found during dissimilar searches in which that answer is not relevant.
- **Write a concise summary**—The quality of the summary, meaning how closely it summarizes the contents of an answer, is critical to the effectiveness of the answer and affects its display position, how it links to related answers, and how it is grouped with similar answers. On the Find Answers page, customers will choose to open and read or skip over an answer based on the summary. Without a concise summary, customers may not open the answer, which directly impacts its display position and how it is linked with other answers. The summary should state what the customer can expect to learn by reading the answer or what question will be answered.
- **Create explicit keywords**—Sometimes, you may not be able to capture the entire contents of an answer in the one-sentence summary. The Keyword field is an additional field, not viewable by customers, used during keyword indexing of an answer. You can enter supplemental keywords, phrases, or text that represent the answer's contents. Keywords should be separated by commas, with grouped words separated by spaces (for example, "cell phones, calling plans, accessories"). You should be deliberate with the words you enter because they are weighted higher. These words can also become groupings when using the Browse function in RightNow Service. Be sure to include a thorough, yet concise section of keywords.

After creating a knowledge base of effective answers, you will want to publish the answers to be accessed by customers. By understanding the factors that determine answer visibility, you can effectively control how and when answers are seen on the end-user interface. The following section will help you as you publish answers to be viewed by your customers.

Controlling answer visibility

When you publish answers, you make them available to the public on your end-user interface. Answers can be either public or private, as well as have specific visibility settings for each interface or for contacts based on access levels defined in their SLAs. Whether answers will be visible on your end-user interface is determined by what you specify in certain fields. This section explains the following five key fields that determine how and where answers will be presented.

- Answer Status
- Answer Access Level
- Language
- Products and Categories
- Conditional Sections

In order for answers to appear on the end-user interface, the Status, Language, Access Level, Product, and Category fields must be set to a visibility that allows access by customers. If even one field does not allow visibility, the answer will not be available through the end-user interface. In addition, if you have sections within an answer with restricted visibility, that section must be assigned an access level associated with the answer and have end-user visibility.

Answer status

The first factor that determines the visibility of an answer is the answer status. There can be many custom answer statuses, but all must be either a Public or Private status type, which is determined when the custom status is created. Answers set to a status that has a Private status type can never be viewed on the end-user interface, regardless of their access or language assignment. Public answers may be viewable through the end-user interface, depending on the other fields selected.

Two of the default answer statuses are Review and Proposed, both of which have a Private status type. When agents propose an incident to become an answer, it is copied and set to the Proposed status with an access level of Everyone. Since the Proposed status is a Private status type, the answer will not be visible to customers.

An answer changes to the Review status type when its solved count reaches zero or when the date specified when creating or editing an answer is reached. The Review status type will automatically remove the answer from the end-user interface.

Answer access level

The second factor that affects visibility of answers is the access level. Access levels determine whether customers can view answers on a per-interface basis. If an answer is set to an access level that has customer visibility on one of the interfaces, then that answer will be viewable by everyone on the end-user pages of that interface, provided the remaining fields also allow visibility. If an access level does not provide visibility to customers for a certain interface, access can still be given to specific contacts by assigning them SLAs that allow privileged access.

One of the default access levels for answers is Everyone. This access level allows all customers to have access to the answer on all interfaces.

Language

Answer visibility is also determined by the language assigned to it. If assigned to a specific language, an answer will only be visible on the end-user pages for interfaces using that language, as long as the answer status and access level also allow visibility.

Products and categories

The visibility settings for the products and categories associated with the answer will also affect the visibility. If the answer is assigned to a product or category that is not visible to customers on a particular interface, the answer will also not be visible to customers, unless it is assigned to another product or category that is visible on the end-user interface. In other words, if you have an answer that is assigned to two products, and one of the products is not visible on the end-user interface, but the other product is, your answer will appear on the end-user interface. However, if the answer is assigned to two products, and neither product is visible on the end-user interface, your answer will not appear on the end-user interface under any circumstances.

Conditional sections

Finally, conditional sections help control visibility of certain sections within an answer. If a section of the answer is assigned an access level that is not visible to customers on a particular interface, but the answer is visible, then customers will be able to view the answer but not the conditional section. For more information on conditional sections in answers, refer to "Conditional sections overview" on page 151.

Troubleshooting when answers are not visible

If an answer (or section within an answer) you want to be accessed by your customers is not appearing on the end-user interface, answer the following questions to troubleshoot the problem:

- Is your status set to Public or a custom status with a status type of Public?
- Does the access level have end-user visibility for the desired interface?
- Is your language for the answer appropriate? If you have more than one interface with multiple languages, is the answer set to the same language as the interface you are trying to view it on?
- Are your products and categories visible on the end-user interface? Is your answer assigned to at least one product/category that is visible to customers?
- Are the answer sections within the answer visible as you intended?

If the answer to any of these questions is "no," make the appropriate changes and check again to see if the answer appears. If you are unsure of the answer to any of the above questions, contact your RightNow administrator.

◇ **Tip** You can preview an answer to view it as customers will see it on the end-user interface. Refer to "Previewing answers" on page 168.

Organizing answers

Through click-track analysis and feedback on answers, your answers are automatically organized. Answer rankings are constantly updated using the solved count value and presented to your customers with the most useful information first. RightNow Service uses three techniques to gather useful information on answers:

- **Explicit customer feedback**—By default, the Answer page offers customers a way to rate answers through the "How well did this answer your question?" option. Their responses automatically raise or lower the solved count of answers.
- **Explicit ranking of the answers**—You can explicitly rank answers at certain levels in the knowledge base using the Display Position setting. This is often useful when new issues arise.
- **Click-track analysis**—RightNow Service analyzes the path each customer takes through the knowledge base. The use and benefits are two-fold:
  - Answer relatedness—An affinity map is built which relates answers that customers view to other answers viewed during the same session. Through the SmartAssistant feature, RightNow Service suggests answers to them based on the historical relationships of that answer to other answers in the knowledge base. The suggested answers appear as learned links on the Relationships tab. Refer to "Managing answer relationships" on page 133.
  - Implicit ranking—The click-track data is also used for answer ranking. Each time an answer is viewed by a customer or suggested by an agent, its solved count is increased.

Rating answers through Solved Count

The Solved Count feature collects information about the usefulness of answers in your knowledge base and uses this data to rank your answers. Implicit data is compiled by how customers select and view answers; explicit data is compiled by how customers rate the effectiveness of individual answers. Using the solved count values, RightNow Service can dynamically rank the answers by their usefulness and present customers with the most effective answers first.

Note By default, the Solved Count feature is enabled.

An answer's score value is a calculated value equal to the answer's solved count combined with any "fix at" positions specified for the answer in the Display Position drop-down menu when adding or editing an answer. For more information about the options available, refer to "Adding answer details" on page 125.

- **Implicit ratings**—Implicit ratings are gathered as customers view answers. If a customer views an answer, the solved count of the first answer is increased, but not as much as the second viewed answer. In other words, the answer that the customer views last receives the largest solved count increase. Previously viewed answers receive a smaller increase in their solved counts. The solved count is also increased when an agent uses a SmartAssistant suggested answer when responding to a customer's question.
- **Explicit ratings**—Explicit ratings are gathered from the response to the question, "How well did this answer your question?" option. This question is displayed at the bottom of the Answer page on the end-user interface.

Aging of Solved Count

Over time, an unused answer's solved count will gradually decline or age. For example, if an answer has not been viewed for thirty days (the default setting), the solved count will automatically be reduced. The solved count of unused answers also declines at a constant rate over time. Ultimately, if an answer has not been viewed for an extended period of time, the answer's solved count can reach zero.

When you first create an answer, its rank in the knowledge base will be low, thereby making it more difficult to access. Generally, you would not want aging to occur on new answers. By default, new answers will not be aged for thirty days. Your RightNow administrator can change the setting to specify an alternate aging period.

Note Your RightNow administrator can also control the frequency and aggressiveness of aging on answers depending on your organization's specific needs. Contact your RightNow administrator for more information about the Solved Count settings defined in your application.

When an answer's solved count reaches zero, this usually means that the answer has not been viewed for a long time, and it is safe to assume that the information may be outdated or not useful. By default, these aged answers will be automatically set to the Review status when their solved count reaches zero. This enables you to easily sort the outdated answers and update them.

Note By default, the Review feature is enabled. Contact your RightNow administrator to disable this feature.

Now that you have thought about your processes for publishing answers and understand how the knowledge base grows and presents information, you need to know how to keep your knowledge base accurate and up-to-date. The next section describes how to use RightNow Service's features to monitor and maintain your knowledge base.

Maintaining your knowledge base

Many of the maintenance tasks related to organizing the answers in your knowledge base are automated in RightNow Service. This enables you to focus on improving and maintaining the content of answers. The following list outlines these automated processes and describes the tools designed to aid with answer management.

- **Aging of answers (solved count)**—Just as frequently used answers will rise to the top of the knowledge base, lesser-used answers will move to the bottom through aging of the answers' solved count. Refer to "Aging of Solved Count" on page 87.
- **Answer review and publish feature**—By using the Review feature, you can easily monitor answers without needing to constantly review them. The Review feature will automatically set an answer to the Review status when the solved count reaches zero or on specifically defined dates. You can also manually set a review date, the date that you want the answer to go into review status. In addition, you can set an answer's publish date for a date in the future. In this way, you can schedule an answer to become public automatically without having to publish. Refer to "Reviewing answers" on page 90.
- **Data mining**—The processes of linking similar answers for the Related Answers feature and grouping answers for the Browse feature are triggered automatically and occur periodically when modifications are made to the knowledge base. These processes implement innovative technologies to cluster and link answers containing similar content.
- **Customer feedback**—RightNow Service closes the loop by providing customers with a method to submit comments and suggestions on answers. Any feedback submitted through the question, "How well did this answer your question?", is turned into a Feedback for Answer incident accessible to agents. You can use this feedback to address content holes and improve answers.
- **Customer session tracking**—RightNow Service tracks customers' actions as they move through your support site, recording where they went, what they searched for, and the answers they viewed. Using the Session feature, agents can view this clickstream data to respond more appropriately to customers' questions. This information can also indicate areas of the knowledge base that need to be tuned. For more information on customer sessions, refer to "Viewing the Session tab" on page 55.
- **Knowledge base reports**—A series of standard reports record how customers are navigating the knowledge base, including the products and categories they are searching on, the search text they are entering, and the answers they are viewing. These reports provide a unique and powerful perspective into how the knowledge base is performing and enable you to pinpoint weak areas and tune the knowledge base content. Refer to "Evaluating answers using service analytics" on page 91.

Evaluating customer feedback

RightNow Service allows your customers to provide feedback on answers that do not completely solve their issues (by answering the question, "How well did this answer your question?"). This feedback can be extremely valuable for understanding customer needs and updating your answers accordingly. When a customer submits comments or suggestions from the feedback form, an unresolved incident is automatically created.

Note In some instances, customer feedback can be incorporated directly into an existing answer; in other cases, new answers may need to be created.

Reviewing answers

Over time, the content of your answers can become outdated. Consequently, reviewing the answers should become a central part of maintaining your knowledge base to ensure that the content is current, relevant, and useful. You may want to review answers at set intervals, such as every six months, or review answers in conjunction with new product releases or upgrades. If you have a group of answers for a particular product or service, you may want to review the answers in bulk. This can help you develop and prepare information in advance.

◈ **Tip** By using custom fields, custom answer statuses, and answer access levels, you can easily sort and work on answers in different stages of editing. For example, your RightNow administrator may have created a private answer status called Manager Review for newly crafted answers that will require manager approval before being published.

When editing an answer, you can set a specific date to review a particular answer. On the review date, the status of the answer will change from Public to Review. Also, by default, if an answer is not viewed by customers, the answer's solved count will reduce to zero, and the status of the answer will change to Review. Refer to "Aging of Solved Count" on page 87.

◈ **Tip** To maintain information on a particular topic in one answer, use the Notes field to store upcoming information or material you are currently editing.

Identifying content holes

You should actively investigate material for new answers by reviewing recently submitted incidents. Agents may become overwhelmed with assistance requests, and despite their best intentions, they may forget or not have enough time to propose new answers. By continually capturing questions submitted by your customers and crafting new answers that solve those questions, you can publish answers for the most relevant and current issues.

As you search the most recently solved incidents, view the session logs to see if customers searched or viewed any answers before submitting their incident. In this way, you can locate answers that are incomplete or need updating. For more information, refer to "Viewing the Session tab" on page 55.

◇ **Tip** Before creating a new answer, search for existing answers that cover the topic. You can avoid duplication by updating an existing answer, rather than creating a new one.

Evaluating answers using service analytics

RightNow Service has several standard reports that track customer activity and provide data on the effectiveness of your knowledge base. One of the most useful reports for identifying subject matter holes in your knowledge base is the Information Gaps report. This report creates knowledge clusters from your existing incidents and compares them to your answers, alerting you when incidents are created that are not closely matched to any answer. By browsing the incidents and their cluster topics, you can evaluate the need for additional answers in your knowledge base.

You can also use the following reports to analyze your knowledge base:

- Admin Answers Accessed
- Answer Notifications
- Answers Viewed
- Keyword Search
- Operations Dashboard
- Service Summary
- Session Tracking
- Site Effectiveness

For more information about service reports, refer to the *RightNow 8.2 Standard Reports Reference*.

Overview of answers

One of the greatest ways you can improve your customers' experience is to have answers to common questions readily available on your support site. With RightNow Service, you can create answers about your services and products and post them on your site. You can also create public answers from incidents in your knowledge base, or agents can propose incidents to become answers.

Once an answer is in your knowledge base, you can update it at any time, making sure your knowledge base contains only the most up-to-date information. For example, you can define specific dates to review an answer and change the answer to Private while you update the details. And formatting answers is easy with RightNow Service's HTML editor, which allows you to create links, tables, graphics, and use other HTML features without prior HTML knowledge. As a result, your support site will be more interactive and visually appealing.

Answers reports

When you first log in to RightNow and click the Answers button on the navigation pane, the reports available to all staff members with your profile will display in the navigation list. Figure 39 on page 93 shows the Answers Default report on the content pane.

Path: Answers>Double-Click Answers Default

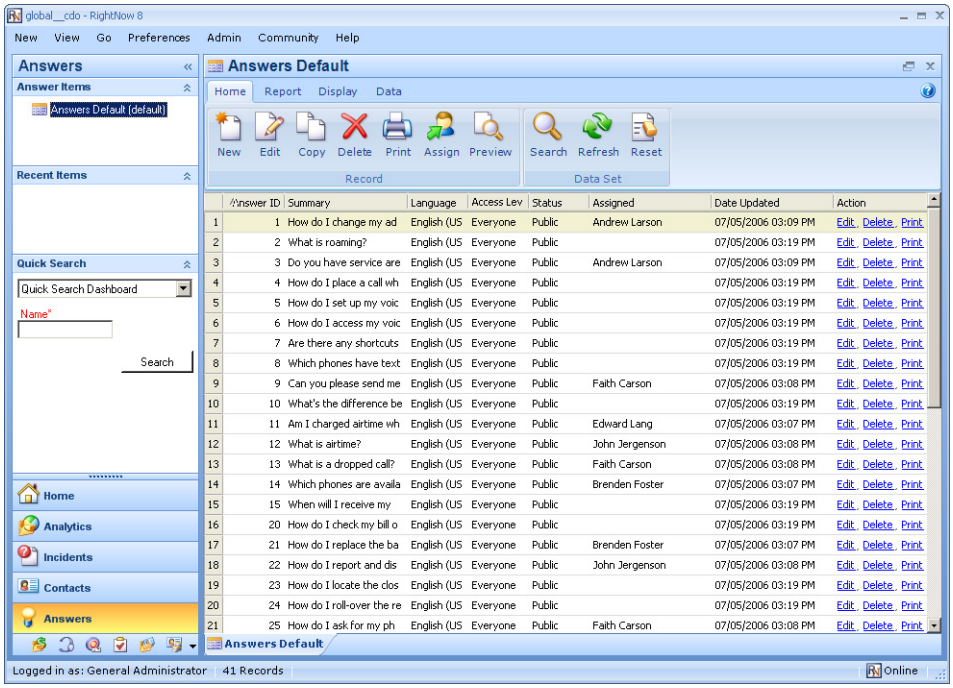

global__cdo - RightNow 8
New View Go Preferences Admin Community Help
Answers
Answer Items
Answers Default (default)
Recent Items
Quick Search
Quick Search Dashboard
Name*
Search
Home
Analytics
Incidents
Contacts
Answers
Answers Default
Home Report Display Data
New Edit Copy Delete Print Assign Preview
Search Refresh Reset
Record
Data Set
Answer ID Summary Language Access Lev Status Assigned Date Updated Action
1 How do I change my ad English (US Everyone Public Andrew Larson 07/05/2006 03:09 PM Edit Delete Print
2 What is roaming? English (US Everyone Public 07/05/2006 03:19 PM Edit Delete Print
3 Do you have service are English (US Everyone Public Andrew Larson 07/05/2006 03:09 PM Edit Delete Print
4 How do I place a call wh English (US Everyone Public 07/05/2006 03:19 PM Edit Delete Print
5 How do I set up my voic English (US Everyone Public 07/05/2006 03:19 PM Edit Delete Print
6 How do I access my voic English (US Everyone Public 07/05/2006 03:19 PM Edit Delete Print
7 Are there any shortcuts English (US Everyone Public 07/05/2006 03:19 PM Edit Delete Print
8 Which phones have text English (US Everyone Public 07/05/2006 03:19 PM Edit Delete Print
9 Can you please send me English (US Everyone Public Faith Carson 07/05/2006 03:08 PM Edit Delete Print
10 What's the difference be English (US Everyone Public 07/05/2006 03:19 PM Edit Delete Print
11 Am I charged airtime wh English (US Everyone Public Edward Lang 07/05/2006 03:07 PM Edit Delete Print
12 What is airtime? English (US Everyone Public John Jergenson 07/05/2006 03:08 PM Edit Delete Print
13 What is a dropped call? English (US Everyone Public Faith Carson 07/05/2006 03:08 PM Edit Delete Print
14 Which phones are availa English (US Everyone Public Brenden Foster 07/05/2006 03:07 PM Edit Delete Print
15 When will I receive my English (US Everyone Public 07/05/2006 03:19 PM Edit Delete Print
16 20 How do I check my bill o English (US Everyone Public 07/05/2006 03:19 PM Edit Delete Print
17 21 How do I replace the ba English (US Everyone Public Brenden Foster 07/05/2006 03:07 PM Edit Delete Print
18 22 How do I report and dis English (US Everyone Public John Jergenson 07/05/2006 03:08 PM Edit Delete Print
19 23 How do I locate the clos English (US Everyone Public 07/05/2006 03:19 PM Edit Delete Print
20 24 How do I roll-over the re English (US Everyone Public 07/05/2006 03:19 PM Edit Delete Print
21 25 How do I ask for my ph English (US Everyone Public Faith Carson 07/05/2006 03:08 PM Edit Delete Print
Answers Default
Logged in as: General Administrator 41 Records
Online

Figure 39: Answers Default Report

The report displays the list of all the current answers in your knowledge base. The ribbon contains several buttons used for working with one or more answers in the report. Table 13 describes the buttons on this ribbon.

Note You can right-click any answer and select the same functions that are available on the answer report ribbon.

Table 13: Answers Report Ribbon Description

Button	Description
New	Click this button to add an answer.
Edit	Click this button to open the selected answer for editing.

Table 13: Answers Report Ribbon Description (Continued)

Button	Description
Copy	Click this button to copy the selected answer. The Copy Answer window opens where you can change the access level, language, or status, or leave the settings as they are. You can also create a sibling relationship between the answer and the copy and copy any files attached to the answer. Click the OK button and the answer will open with a new summary: [previous answer summary] (Copy of Answer [answer ID]). Refer to "Copying answers" on page 166.
Delete	Click this button to delete the selected answer. Refer to "Deleting answers" on page 166.
Print	Click this button to open the Print Dialog window, where you can print the selected answer. Refer to "Printing answers" on page 167.
Assign	Click this button to assign the selected answer to another staff member.
Preview	Click this button to preview the selected answer as your customers will see it on the end-user interface. Refer to "Previewing answers" on page 168.
Search	Click this button to search the knowledge base for a particular answer. Refer to "Searching for answers" on page 101.
Refresh	Click this button to refresh the list of answers in the report.
Reset	Click this button to reset the list of answers in the report. For example, when you perform a search, the search results display in the list. To reset the results and display the original list of answers, click the Reset button.

Standard answer workspace

RightNow Service provides a standard workspace for working with answers. The workspace defines which fields are available, what toolbars and buttons display, and how the information is organized on the content pane. Figure 40 is an example of the standard answer workspace.

Path: New>Answer

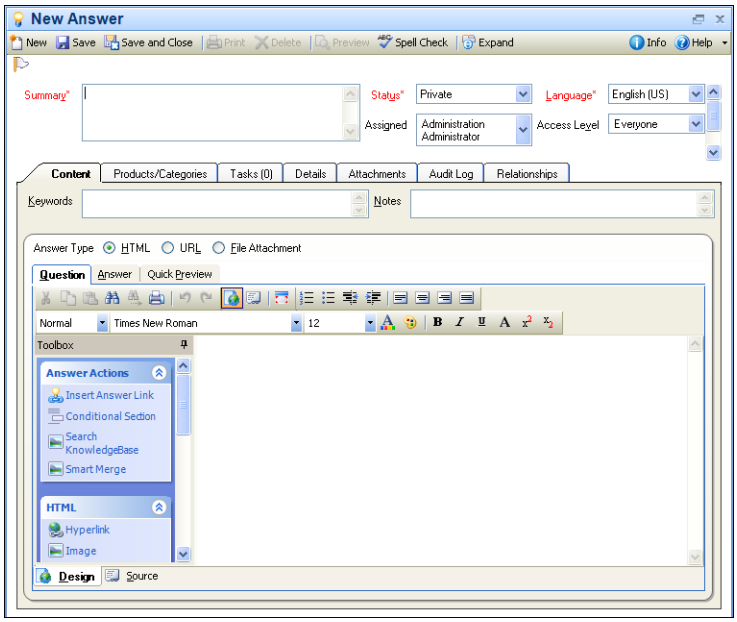


Figure 40: Standard Answer Workspace

Your organization may use this standard workspace, or your RightNow administrator may have created one or more customized workspaces. Your profile defines the workspace you see when you work with answers, whether it is the standard workspace or a customized workspace. This chapter uses the standard workspace to describe how you work with answers, but keep in mind that the workspace your profile uses may display a different combination of fields, or it may display them in a different location on the content pane.

The standard workspace for answers contain the following main elements:

- **Toolbar**—Consists of buttons for taking actions on answers. Refer to "Toolbar" on page 96.
- **Key answer fields**—Consists of key answer fields related to answer management. Refer to "Key answer fields" on page 97.
- **Answer record tabs**—Consist of additional fields for entering information about the answer. Refer to "Answer record tabs" on page 98.

Each element of the standard answer workspace is described in the following sections, along with cross-references where appropriate.

Toolbar

A standard toolbar exists for working with answers. Table 14 provides a description of the buttons available by default on this toolbar.

Table 14: Answer Toolbar Description

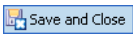
Button	Description
	Click this button to add an answer. For instructions on adding an answer, refer to "Adding answers" on page 109.
	Click this button to save the answer without closing it. The answer remains open. **Note:** When you save an answer, it is evaluated by the rules engine. If your RightNow administrator added answer rules and the answer matches one or more of those rules, it is possible that the answer will be modified by rule actions when you save it. For example, a rule can change an answer's status or answer access level.
	Click this button to save and close the answer.
	Click this button to print the answer. Refer to "Printing answers" on page 167.
	Click this button to delete the answer. Refer to "Deleting answers" on page 166. **Caution!** Deleting an answer affects all relationships associated with the answer. Use caution when deleting answers.
	Click this button to view the answer as it will appear to your customers. Refer to "Previewing answers" on page 168.
	Click this button to check the spelling of any answer fields that have spell check enabled. **Note:** Text on the answer's Content tab is automatically checked for correct spelling. For information about spell checking, refer to the *RightNow 8.2 User Manual*.
	Click this button to toggle between displaying the answer either with the information organized on record tabs or as a scrolling view, where all information is on one screen you can scroll down to display.

Table 14: Answer Toolbar Description (Continued)

Button	Description
Info	Mouse over this button to see details about the answer, including when it was created and last updated, the staff member who last edited it, the date of the last answer update notification, and the date of the next answer update notification. If the answer is in a rules state or has an escalation level, that information also appears.
Help	Click this button to view online help for working with answers.

Key answer fields

When you work on an answer, the top of the content pane contains key answer fields, and the bottom contains the record tabs, as shown in Figure 40 on page 95. These fields are used to specify the answer summary, status, language, access level, and the staff member assigned to the answer. Some of the fields are required. You must complete any field marked with a red label and bullet before you can save the answer. Refer to Table 15 for a description of the answer information.

Important The answer fields that display will vary depending on the permissions set in your profile.

Table 15: Key Answer Fields Description

Field	Description
***Summary**	Type the subject of the answer in this field.
***Status**	Select a status from the drop-down menu. To publish the answer, select the Public status.
***Language**	Select a language from the drop-down menu.
Assigned	Select a staff member from the drop-down menu to assign to the answer. Only staff members who have permission in their profile to create answers are listed. **Note:** By default, the staff member who created the answer is selected.
Access Level	Select an access level from the drop-down menu. For information on associating multiple access levels to an answer, refer to "Associating answers with multiple access levels" on page 150.

Answer record tabs

Record tabs contain fields and options for adding additional information to answers. The organization of these tabs allows you to manage and edit information and quickly move between the tabs as you work with answers. The information available on each tab depends on the permissions set in your profile. Figure 41 shows the record tabs for answers.

Path: New>Answer

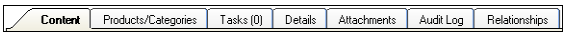


Figure 41: Answer Record Tabs

Important If you make changes to fields on any of the answer record tabs or any of the windows opened through the record tabs, you must save the answer in order for all changes on the record tabs to take effect. If you close the record without saving changes, those changes will be lost.

Table 16 describes the information contained on each of the answer record tabs.

Table 16: Answer Record Tabs Description

Tab	Description
Content	The following actions can be performed on the Content tab. • Fill in the keywords field. • Add notes to the answer. • Enter the question and answer fields. Refer to "Key answer fields" on page 97. • Change answer types to add answers. Refer to "Adding answers" on page 109. • Switch between Source Mode and Design Mode. For information on creating HTML answers, refer to "Adding HTML answers" on page 112. • Insert sections in answers with restricted visibility. Refer to "Inserting conditional sections" on page 152. • Insert a link to another answer. Refer to "Inserting answer links" on page 148. • Merge similar answers. Refer to "Merging answers" on page 154. • Insert a hyperlink. Refer to "Inserting hyperlinks" on page 140. • Insert an image. Refer to "Inserting images" on page 142. • Insert a table. Refer to "Inserting tables" on page 143. • Manage anchors. Refer to "Managing anchors" on page 149.
Products/Categories	The following actions can be performed on the Products/Categories tab. • Select products to associate with an answer. • Select categories to associate with an answer. For information on associating products and categories with an answer, refer to "Associating products and categories" on page 120.

Table 16: Answer Record Tabs Description (Continued)

Tab	Description
Tasks	The following actions can be performed on the Tasks tab. • Add new tasks or assign existing tasks to the answer. • Edit, copy, delete, forward, or print tasks associated with the answer. • Mark tasks as complete. • Attach files to a task. Refer to "Adding tasks" on page 121. **Note:** The number of tasks assigned to the answer display between the parentheses on the Tasks tab.
Details	The following actions can be performed on the Details tab. • Fill in answer details including Display Position, Review On, Notify Subscribers, Publish On, and any answer reports assigned to the current workspace. Refer to "Adding answer details" on page 125.
Attachments	Attach files to an answer and view file attachments. Refer to "Attaching files to answers" on page 126.
Audit Log	View all actions taken on the answer. Refer to "Viewing the answer audit log" on page 132.
Relationships	The following actions can be performed on the Relationships tab. • Relate answers using RightNow Service's sibling answers. Refer to "Sibling answers" on page 134. • Manually relate a new or existing answer with the current answer. Refer to "Manually related answers" on page 137. • View, edit, print, preview, promote, or block links automatically related to the answer due to customer activity. Refer to "Learned links" on page 138.

Searching for answers

You can quickly find a specific answer or group of answers meeting certain criteria using one of RightNow's search techniques. You can search for answers in two ways.

- **Using Quick Search**—Search for a specific answer when you have only limited information. For information on Quick Search, refer to the *RightNow 8.2 User Manual*.
- **Using search and selection criteria**—Search for answers based on selection criteria that includes words or phrases, or answers set to a particular status. The criteria available to search on depends on the permissions assigned in your profile.

Searching for answers using search and selection criteria

Searching for answers using the Search function allows you to isolate answers that meet certain criteria. You can search for answers containing words or phrases, and you can also choose other criteria, such as answers set to a particular status. In addition, you can choose to sort your search results using up to eight answer fields in ascending or descending order.

The following procedure shows searching for an answer using the default search and selection criteria.

To search for an answer using search and selection criteria:

1 Click Search on the answer report ribbon.

Path: Answers Report>Search

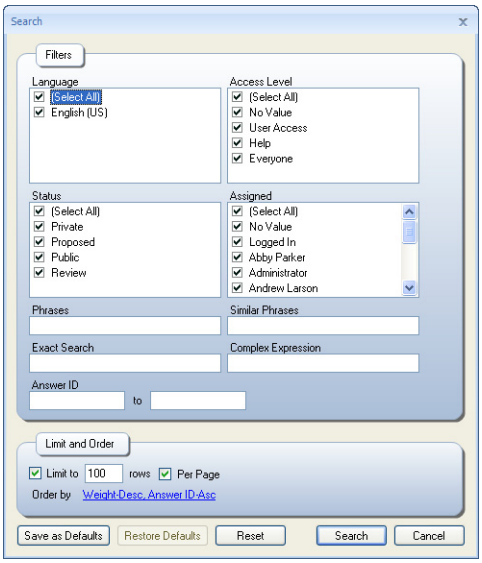


Figure 42: Answer Search Window

2 Enter field information described in Table 17. You can search using any combination of the following criteria.

Table 17: Answer Search Window Description

Field	Description
Language	Select the check box next to each language you want to include in your search.
Access Level	Select the check box next to each access level you want to include in your search.
Status	Select the check box next to each status you want to include in your search.
Assigned	Select the check box next to each staff member you want to include in your search. Staff member search will return answers assigned to the staff member specified.

Table 17: Answer Search Window Description (Continued)

Field	Description
Phrases	Type the words or phrases in this field to search the answer Summary, Question, Answer, and Keywords fields. The match is determined based on the similarity between the words or phrases. Word stemming and logical operators are supported. When searching using phrases, you cannot search for characters that have special searching functions (for example, "+," "-," and "*"). Therefore, you cannot search for a word containing one of these characters (for example, "-9" (negative nine)). For a list of special characters, refer to "Using special characters when searching" on page 105.
Similar Phrases	Type the words or phrases in this field to search the answer Summary, Question, Answer, and Keywords fields. The words and phrases are first checked for correct spelling. If the word is spelled correctly, a list of synonyms is generated for each word, and the search is performed using this list. If the word is spelled incorrectly, the spell checker generates ten suggested words, which are used in the search. Word stemming and logical operators are supported. When searching using similar phrases, you cannot search for characters that have special searching functions (for example, "+," "-," and "*"). Therefore, you cannot search for a word containing one of these characters (for example, "-9" (negative nine)). For a list of special characters, refer to "Using special characters when searching" on page 105.
Exact Search	Type the words or phrases in this field to search the answer Summary, Question, Answer, and Keywords fields. Using this technique, only answers containing an identical pattern of words are matched. The pattern in the returned answers may be different from the search text because the answer may contain the same sequence of stemmed words, or use stopwords such as "a," "an," and "the." When searching using exact search, you cannot search for characters that have special searching functions (for example, "+," "-," and "*"). Therefore, you cannot search for a word containing one of these characters (for example, "-9" (negative nine)). For a list of special characters, refer to "Using special characters when searching" on page 105.

Table 17: Answer Search Window Description (Continued)

Field	Description
Complex Expression	Type the complex expression in this field to search the answer Summary, Question, Answer, and Keywords fields. This technique allows wildcard searching using an asterisk (*) at the end of a word or partial word and a tilde (~) before a word to perform a similar phrases search on that word only. Word stemming and logical operators are also supported. When searching using a complex expression, you cannot search for characters that have special searching functions (for example, "+," "-," and "*"). Therefore, you cannot search for a word containing one of these characters (for example, "-9" (negative nine)). For a list of special characters, refer to "Using special characters when searching" on page 105.
Answer ID	Type a range of answer IDs to search for answers with answer IDs within the range specified. For example, typing 5 and 20 would find answers with an answer ID between 5 and 20. Wildcard characters are not supported.
Limit and Order	Fill in the following fields to limit and order the results returned in a search.
Limit to	Select this check box to limit the number of records returned in the search. The check box is cleared by default. **Note:** If the Limit to check box is cleared, the search results will be unlimited.
rows	Type the number of rows you want to limit the search results to. **Note:** If the Limit To check box is cleared, this field will be disabled.
Order by	Click the underlined text next to this field to open the Sort window and select a field to sort by. Sort fields include Answer ID, Summary, Language, Access Level, Status, Assigned, Date Updated, and Weight. You can also choose to sort in ascending or descending order. **Note:** To sort by additional fields, select the field from the Then By drop-down menu. You can sort by up to eight answer fields in ascending or descending order.

3 To save the current search and selection criteria as the default settings, click the Save as Defaults button.

4 To restore the selection and search criteria to the default settings, click the Restore Defaults button.

5 To reset the current selection criteria to their default values, click the Reset button.

6 Click the Search button to view the answers meeting your selection and search criteria.

To return all answers, leave all fields blank in the Answer Search window and click the Search button.

Using special characters when searching

RightNow Service supports wildcard searching and also allows other characters to produce more accurate results. This section contains a list of the characters you can use, including how RightNow Service will interpret the characters, and the importance of the placement of the characters in the text string. Also included is a list of characters that are not valid to use when searching.

Note All of these guidelines apply when you are searching using a complex expression. When you are searching using phrases, similar phrases, and exact search, only the following characters apply: + -. _ / @ : <> & and white space.

Table 18: Special Characters Allowed when Searching

Character	Description
+	Always considered the logical operator meaning "must include."
-	May appear in the middle of a word or number, but when it is placed at the beginning of a word or number, it is always taken to mean "must not include."
.	May appear in the middle of a word or number, but is otherwise considered punctuation.
_	May appear in the middle of a word, but is otherwise unrecognized.
/	May appear in the middle of a capitalized word or a number, but is otherwise considered punctuation. **Note:** and/or uses the / as punctuation to separate the word "and" from "or," but I/O is recognized as a single word.
@	May appear in the middle of a word, but is otherwise unrecognized.

Table 18: Special Characters Allowed when Searching (Continued)

Character	Description
*	Allowed only at the end of a word or number. It will act as a word separator otherwise. One exception is that it is specifically recognized as a leading character when directly preceding the @ to allow regular expression searching of the sort: *@rightnow.com.
:	Allowed within a number only; otherwise, it is considered punctuation.
< >	Text enclosed within the angle brackets "<" and ">" is ignored. Otherwise, the angle brackets are treated as punctuation.
&	Allowed as part of an embedded word, but is otherwise considered punctuation.
Whitespace (tab, return, space)	Ignored and acts as a word separator.
~	Allowed after a word to specify a broader search on the following word by using synonym expression and spelling correction.

Note Punctuation is ignored and also acts as a word separator. Except as noted in Table 18 on page 105, the following characters are considered punctuation:

! ? ' . ! ? # $ % ^ & * ( ) / _ = + \ | : ; , " ` ~ < > { } [-]

Managing answers

You can manage answers in your knowledge base by grouping similar answers using answer relationships. Answers can also be related using products and categories, manually created relationships, or learned links from customer activity on your end-user interface. For information, refer to "Managing answer relationships" on page 133.

Although you may add many answers to your knowledge base as your organization provides new products and services, you may also spend a lot of time managing and updating your current answers. You can add information to existing answers, including adding links to other answers, merging similar answers, and adding conditional sections within an answer to control visibility of certain information. This section describes the procedures to add answers and manage existing answers.

Figure 43 on page 108 shows the actions that can be performed on an answer.

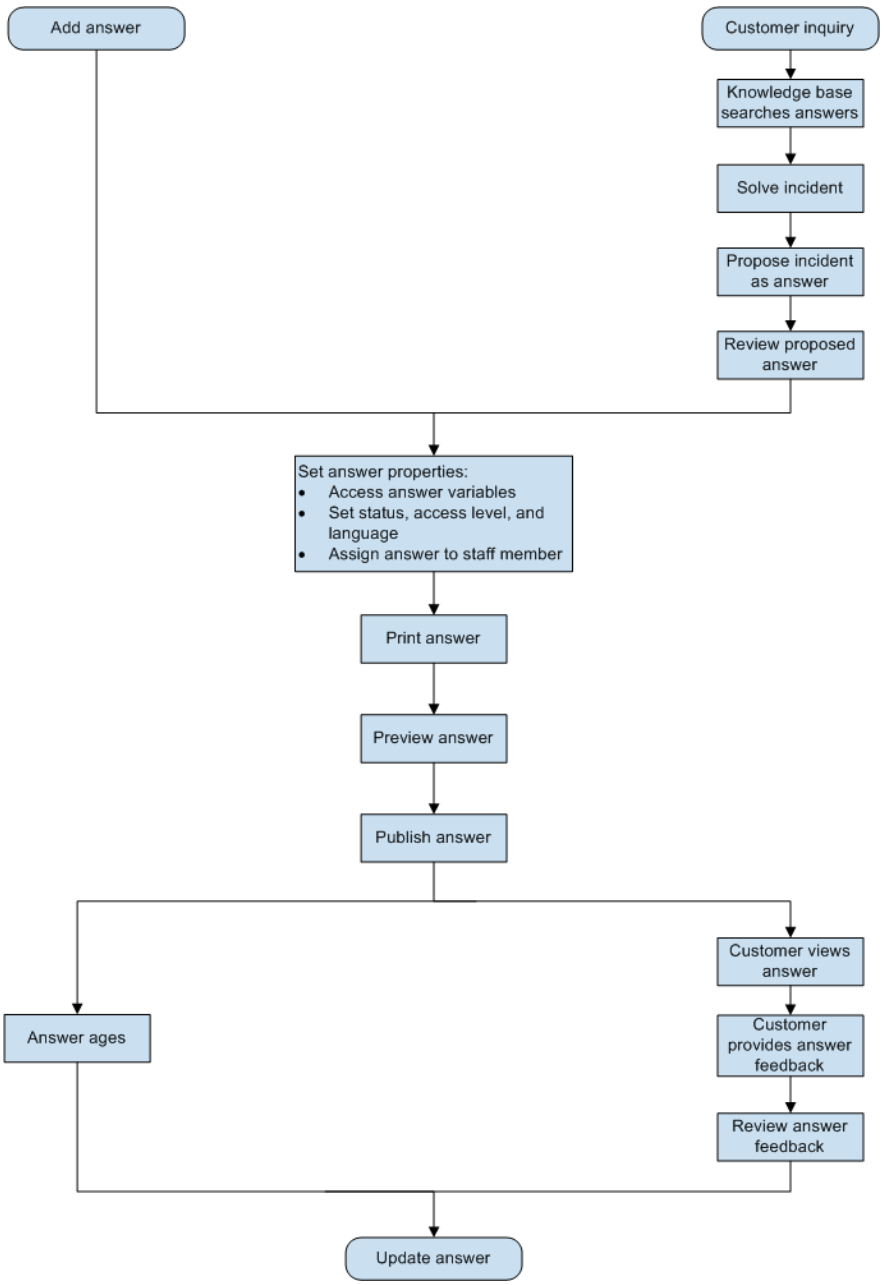


Figure 43: Managing Answers

Adding answers

RightNow Service provides answer types to choose from when adding answers to the knowledge base. Answer types allow more flexibility in providing information to your customers. You can add the following types of answers:

- **HTML**—Answers that appear to customers as standard HTML on the end-user interface. When you create an HTML answer, you can use the HTML editor to view answers as customers will see them. For information about using the HTML editor to create answers, refer to "Adding HTML answers" on page 112.
- **URL**—Answers that consist of a link to an external URL. The URL address and the content of the web page are displayed. For information about creating URL answers, refer to "Adding URL answers" on page 116.
- **File attachment**—Answers that appear as a file attachment. You can select a file your customers can access when viewing the answer. For information about creating file attachment answers, refer to "Adding file attachment answers" on page 117.

Caution When you change the answer type, certain fields will be removed. For example, when you change an HTML answer type to a URL answer type, you will lose the Question, Answer, File Attachment(s), Manually Related Answer(s), and Learned Link(s) fields. Read the Confirm Answer Type Change prompt carefully before you continue.

The following procedure contains the basic steps for adding answers. Following this procedure are separate procedures for adding HTML, URL, and file attachment answers.

To add an answer:

1 Click New and select Answer.

Path: New>Answer

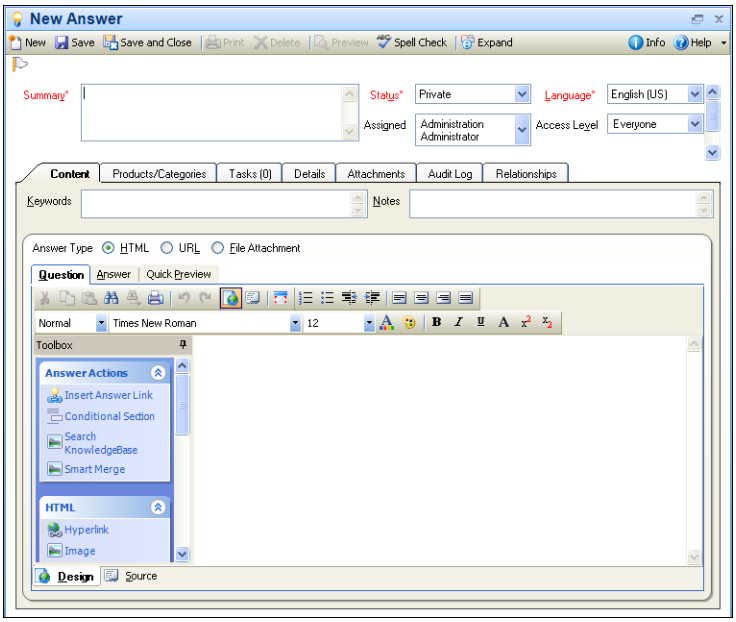


Figure 44: Adding an Answer

2 Enter field information described in Table 15 on page 97.

3 To add a flag to the answer, click the area next to the white flag under the toolbar.

a To change the importance of the flag from No Importance, select red (High), blue (Medium), or green (Low).

b To add text to the flag, select Edit Flag Text and type text in the Edit Flag window that opens.

4 Select the answer type. For information on adding HTML answers, refer to "Adding HTML answers" on page 112. For information on adding URL answers, refer to "Adding URL answers" on page 116. For information on adding file attachment answers, refer to "Adding file attachment answers" on page 117.

5 To add keywords to associate with the answer, click the Content tab and type the words in the Keywords field.

Note Keywords should be separated by commas, with grouped words separated by spaces (for example, "phone, call plan, nationwide"). Keywords are used by the searching feature and the Browse search method. Any keywords you type are given the greatest weight when a customer is searching on the Find Answers page, and when RightNow Service is clustering the answers for use in the Browse search method. For more information, refer to the *RightNow 8.2 Service Administrator Manual*.

6 To enter notes about the answer, click the Content tab and type the notes in the Notes field. Notes will not be visible to customers on the end-user interface.

7 To associate products and categories with the answer, click the Products/Categories tab. For information about adding products and categories, refer to "Associating products and categories" on page 120.

8 To add tasks to the answer, click the Tasks tab. For information about adding tasks, refer to "Adding tasks" on page 121.

9 To add additional details to the answer including Publish On and Review On fields, click the Details tab. For information about adding answer details, refer to "Adding answer details" on page 125.

10 To attach files to the answer, click the Attachments tab. For information about attaching files, refer to "Attaching files to answers" on page 126.

11 To view the answer audit log, click the Audit Log tab. For information about the audit log, refer to "Viewing the answer audit log" on page 132.

12 To manage answer relationships, including sibling answers, manually related answers, and learned links, click the Relationships tab. For information about the Relationships tab, refer to "Managing answer relationships" on page 133.

13 Click the Save and Close button to save and close the answer.

Adding HTML answers

The default answer type is HTML. You can use the HTML editor to design creative and eye-catching answers. The Content tab contains three additional tabs that you can move between to create and preview content for answers.

- Question
- Answer
- Quick Preview

You can design answer content using the design mode or the source mode. With the Design Mode, you can create dynamic, well-formatted answers without previous HTML experience. You can include special formatting in your text and add graphics, links, and other HTML features. You can also add links that reference other existing answers. The HTML editor contains many of the same options available in basic word processing applications.

Using Source Mode, you can create answers using HTML source code. Regardless of which mode you use to create answers, you can preview how the content will appear to customers on the end-user interface from the Quick Preview tab.

The following procedure is for adding an HTML answer in design mode. For information on adding an HTML answer in source mode, refer to "To add an HTML answer in source mode:" on page 115.

To add an HTML answer in design mode:

1 Click New and select Answer. By default, the Question tab is active.

Path: New>Answer

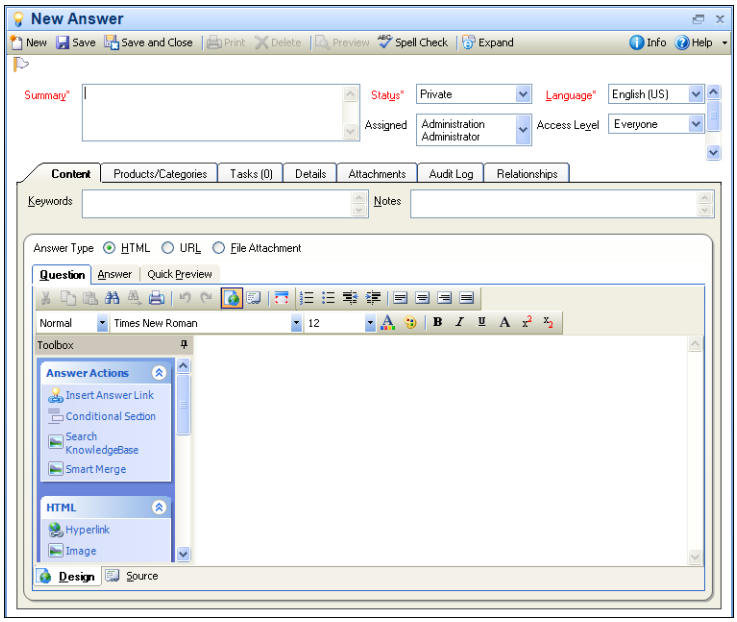


Figure 45: HTML Answer in Design Mode

2 Type a one-line summary in the Summary text box. This field will display as the subject of the answer.

3 Use the HTML editor to add the question portion of the answer.

Or

Click the Answer tab and use the HTML editor to create the answer content. Functions available on the HTML editor include:

- Cut, copy, and paste
- Search for text
- Change font style, size, and attributes (bold, italic, underline)
- Format text in bulleted or numbered lists
- Adjust indentation
- Center, left-justify, or right-justify text and images on the page
- Apply specialized formatting, including super and subscripts and strike-through
- View HTML source code

- Preview the document
- Insert or clean HTML code
- Switch to a full screen

The special functions available in RightNow are accessed through the Toolbox section. The toolbox buttons are described in Table 19.

Table 19: Toolbox Description

Button	Description
Answer Actions	Buttons in this section are used to insert dynamic content in your HTML.
Insert Answer Link	Click this button to insert a link to another answer. For information, refer to "Inserting answer links" on page 148.
Conditional Section	Click this button to insert a section with certain visibility restrictions within the answer. For information, refer to "Inserting conditional sections" on page 152.
Search Knowledge Base	Click this button to search for an answer in the knowledge base with similar content to merge with the current answer. For information, refer to "Merging answer content" on page 158.
Smart Merge	Click this button to merge answers using Smart Merge. For information, refer to "Merging answers using Smart Merge" on page 154.
HTML	Buttons in this section are used to insert standard HTML elements in your answer content.
Hyperlink	Click this button to insert a hyperlink. Refer to "Inserting hyperlinks" on page 140.
Image	Click this button to insert an image. Refer to "Inserting images" on page 142.
Horizontal Rule	Click this button to insert a horizontal line.
Table	Click this button to insert a table. Refer to "Inserting tables" on page 143.
Div	Click this button to insert a DIV block, which you can use to group other element, such as buttons.
Field Set	Click this button to insert a field set.

Table 19: Toolbox Description (Continued)

Button	Description
Button	Click this button to insert a button. Double-click the button on the canvas to edit the button text.
Insert Symbol	Click this button to open the Insert Symbol window and double-click a symbol to insert it at the current cursor position.
Manage Anchors	Click this button to insert an anchor in the answer. Refer to "Managing anchors" on page 149.

4 To preview the answer content as the customers will see it on the end-user interface, click the Quick Preview tab.

◇ **Tip** You can also preview the answer and change the assigned access levels to view answer visibility by clicking the Preview button on the Answer toolbar. For more information, refer to "Previewing answers" on page 168.

Path: New>Answer>Content>Quick Preview

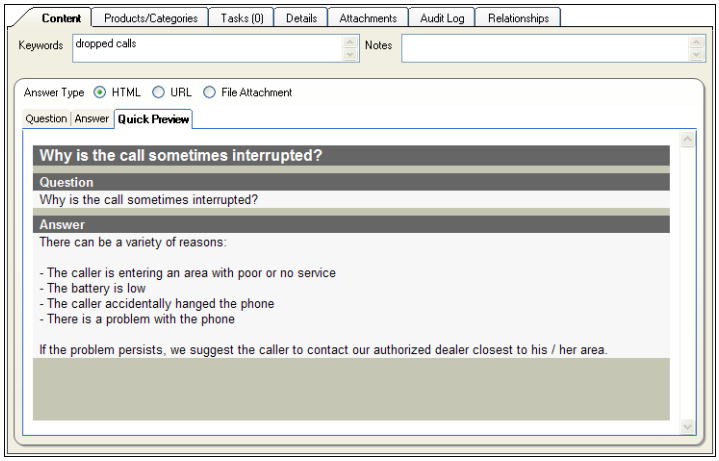


Figure 46: Quick Preview Tab

5 Click the Save and Close button to save and close the answer.

To add an HTML answer in source mode:

1 Repeat steps 1-5 in the previous procedure, "To add an HTML answer in design mode:" on page 112.

2 Click the Source tab on the bottom of the Content tab.

3 Click the Question tab or the Answer tab and type the HTML code to create question or answer content.

4 Click the Save and Close button to save and close the answer.

Adding URL answers

When you create a URL answer, an external URL address will display to customers on the end-user interface. The URL can be clicked by customers and the external web page will open in a new window. You can still define many of the same answer fields as in HTML answers; however, some fields (such as the Question and Answer fields) are unavailable when adding a URL answer. The exact fields available depend on the permissions set in your profile.

To add a URL answer:

1 Repeat steps 1-2 in the procedure, "To add an HTML answer in design mode:" on page 112.

2 Select the URL radio button. The Confirm Answer Type Change window will open.

Path: New>Answer>URL

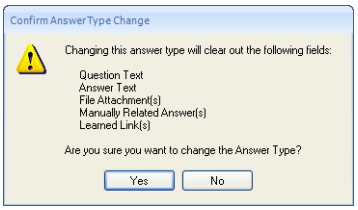


Figure 47: Confirm Answer Type Change Window

Caution Use caution when you change the answer type of an existing answer. Some fields will be removed and cannot be restored (for example, the Question and Answer fields).

3 Click the Yes button in response to the Confirm Answer Type Change message.

Path: New>Answer>URL>Yes

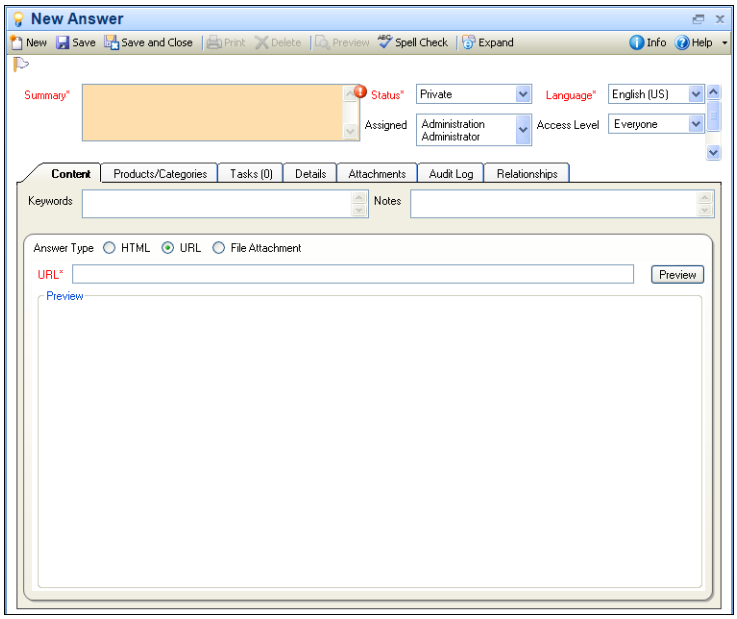


Figure 48: Adding a URL Answer

4 Type or paste a URL address in the URL field.

5 Click the Preview button to display the URL content. The browser section displays the link as it will appear in the customer's web browser. It can also display other file types or folder content.

Note URL answers are not flagged as updated on the Find Answers page when the answer content changes if the URL does not change.

6 Click the Save and Close button to save and close the answer.

Adding file attachment answers

You can add file attachment answers to link to information contained in another document. File attachment answers contain many of the same answer fields as in HTML answers; however, some fields (such as the Question and Answer fields) are unavailable when adding file attachment answers. The exact fields available depend on the permissions set in your profile. You can attach only one file for each answer.

Important File attachment answers appear to customers on the end-user interface as file attachments, which is different than HTML answers that contain file attachments within the answer to provide additional information.

To add a file attachment answer:

1 Repeat steps 1-2 in the procedure, "To add an HTML answer in design mode:" on page 112.

2 Select the File Attachment radio button. The Confirm Answer Type Change window will open.

Path: New>Answer>File Attachment

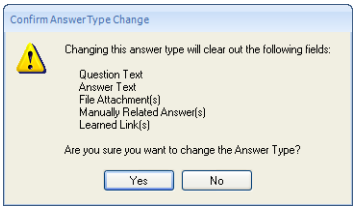


Figure 49: Confirm Answer Type Change Window

Caution Use caution when you change the answer type of an existing answer. Some fields will be removed and cannot be restored (for example, the Question and Answer fields).

3 Click the Yes button in response to the Confirm Answer Type Change message.

Path: New>Answer>File Attachment>Yes

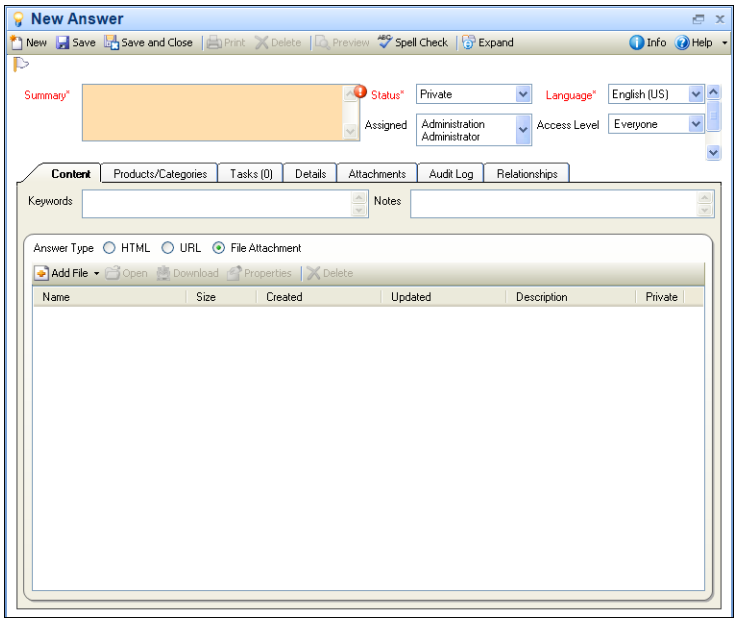


Figure 50: Adding a File Attachment Answer

4 Click the Add File button and select one of the following options:

a Select Browse to browse for the location of the file you want to add. For information, refer to "To browse for a file to attach to an answer:" on page 127.

b Select Search to search for the file you want to add. For information, refer to "To search for a file to attach to an answer:" on page 128.

Information about the selected file will appear on the Content tab.

5 To delete this file, click the Delete button.

6 To change the display of the name and description, click the Properties button and make your changes. For information, refer to "Viewing attachment properties" on page 130.

7 To download the selected file, click the Download button. You will be prompted to save the file attachment to the location you specify. A File Download window will open displaying the download progress.

8 To open the attachment, click the Open button.

Table 20 describes the file information displayed.

Table 20: File Attachment Answer Description

Field	Description
Name	This field displays the name of the file.
Size	This field displays the size of the file.
Created	This field displays the date and time the file was created.
Updated	This field displays the date and time the file was last updated.
Description	This field displays the description of the file defined on the Properties window. **Note:** You can add or edit the file's description by selecting the file, and then clicking the Properties button and typing the description in the Description field. For information on file attachment properties, refer to "Viewing attachment properties" on page 130.
Private	This field displays the visibility of the file attachment answer on the end-user interface. For information on the visibility of file attachments on the end-user interface, refer to "Viewing attachment properties" on page 130.

◇ **Tip** The Content tab contains a paper clip icon when there is a file attached to the file attachment answer.

9 Click the Save and Close button to save and close the answer.

Associating products and categories

You can associate products and categories with answers in RightNow Service. By associating products and categories with your answers, you can create rules and facilitate searching.

To associate products and categories to an answer:

1 Right-click the answer on the content pane and select Edit.

2 Click the Products/Categories tab.

Path: Right-Click Answer>Edit>Products/Categories

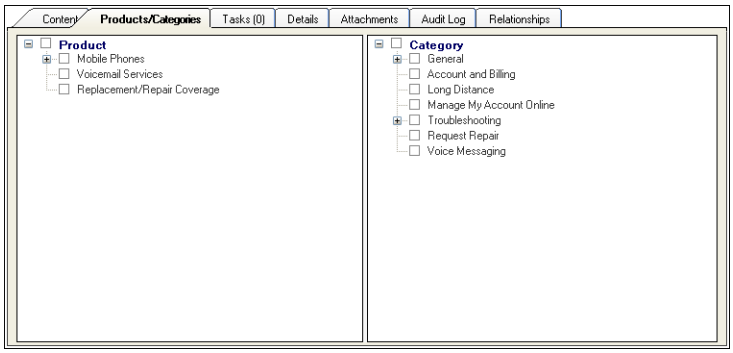


Figure 51: Answer Products/Categories Tab

3 Select products and categories to associate with the answer. By default, when a product or category is selected, all levels below are selected. If product linking is enabled when you select a product, only categories linked to that product are available for selection. For information on product linking, refer to the *RightNow 8.2 Service Administrator Manual.*

Note The product and category values are shared among the sibling answers; when a product or category is changed for an answer, it is also changed for that answer's sibling answers.

Adding tasks

You can add and edit all tasks associated with an answer by clicking the answer's Task tab. When you add or edit a task, you not only define its name, the staff member it is assigned to, relevant dates, and type of task, but you also associate it with new or existing answers.

Path: Right-Click Answer>Edit>Tasks

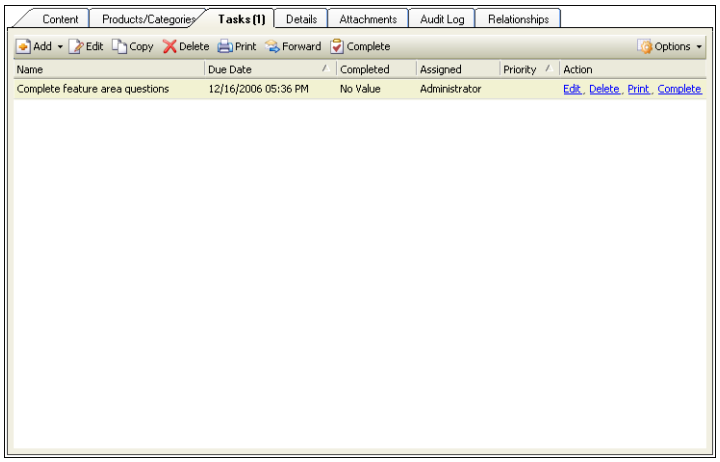


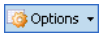
Figure 52: Tasks Tab

The Tasks tab contains a toolbar for working with the tasks associated with the open answer. Table 21 describes the Tasks toolbar buttons.

Table 21: Tasks Tab Toolbar Description

Button	Description
Add	Click this button to add a new or existing task.
Add New	Select this option to add a task.
Add Existing	Select this option to search for a task to add to the answer. For information about adding existing tasks, refer to the *RightNow 8.2 User Manual*.
Edit	Click this button to view or edit the selected task.
Copy	Click this button to copy the selected task.
Delete	Click this button to delete the selected task.
Print	Click this button to print the selected task.

Table 21: Tasks Tab Toolbar Description (Continued)

Button	Description
	Click this button to forward the task to the selected recipient.
	Click this button to mark the task complete. **Note:** You can set multiple tasks to complete by pressing **Ctrl** while selecting each task and then click the Complete button.
	Click this button and select an option for displaying the tasks associated with the answer. Refer to the *RightNow 8.2 Analytics Manual* for information about report options.

To add or edit a task for an answer:

1 Right-click the answer and select Edit.

2 Click the Tasks tab.

3 Click the Add button and select Add New to open the New Task window.

Or

Right-click a task on the Tasks tab and select Edit.

Path: Right-Click Answer>Edit>Tasks>Add>Add New

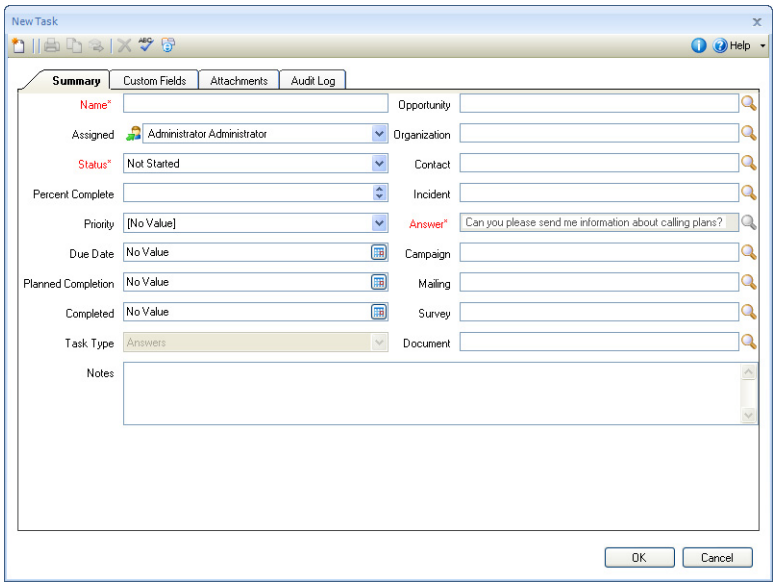


Figure 53: Adding a Task to an Answer

4 Type the task name in the Name field.

5 To enter additional task information, complete the fields or select a menu option. For detailed information about adding and editing tasks, refer to the *RightNow 8.2 User Manual*.

6 Click the OK button.

Adding answer details

The Details tab contains information associated with the selected answer. You can control the display position on the end-user interface, notify subscribers of changes to the answer, and define the review and publish dates for the answer. Table 22 describes the fields on the Details tab.

Table 22: Answer Details Tab Description

Field	Description
Display Position	Click this drop-down menu to determine the answer's display position on the end-user interface.
Historical Usefulness	Select this option to use customer feedback to adjust the ranking of the answer.
Place at Bottom	Select this option to place the answer at the bottom of the list by changing the score to be equal to the lowest answer score. The score is then adjusted as the solved count changes over time.
Place at Middle	Select this option to place the answer at a level that is 50% of the highest answer score. The score is then adjusted as the solved count changes over time.
Place at Top	Select this option to place the answer at the top of the list on the Find Answers page by changing the score to be equal to the highest answer. The score is then adjusted as the solve count changes over time.
Fix at Bottom	Select this option to permanently fix the answer at the bottom of the list on the Find Answers page by changing the score to be equal to the lowest answer score. The answer's score will not increase or decrease over time.
Fix at Middle	Select this option to permanently fix the answer at a level that is 50% of the highest answer score. The answer's score will not increase or decrease over time.
Fix at Top	Select this option to permanently fix the answer at the top of the list on the Find Answers page by changing the score to equal the highest answer score. The answer's score will not increase or decrease over time.

Table 22: Answer Details Tab Description (Continued)

Field	Description
Review On	Click this drop-down menu to access a calendar and select a date to set the answer to the Review status. Use the left and right arrows at the top of the calendar to select the month, and then click a day.
Notify Subscribers	Click this drop-down menu to select an option for notifying subscribers when the answer is updated. Options include Do Not Notify, This Hour, End of Today, End of this Week, End of this Month.
Publish On	Click this drop-down menu to access a calendar and select a date to publish the answer. Use the left and right arrows at the top of the calendar to select the month, and then click a day. On the selected date, the answer status will change to Public, and the answer will be available to customers.

Attaching files to answers

You can also attach as many files as needed to associate with an answer or the answer's siblings. File attachments will appear as clickable links on the end-user interface when a customer views an answer. They can also be indexed as searchable text. You can choose whether each document is indexed when managing your file attachments. For a list of indexable file types, refer to the *RightNow 8.2 Service Administrator Manual*.

Important File attachments differ from file attachment answers in that they appear as an attachment within an answer, whereas file attachment answers appear as clickable attachments on the Find Answers page.

Note The Attachments tab contains a paper clip icon when a file is attached to the answer.

Attachments tab toolbar

The Attachments tab contains a toolbar for working with attachments associated with an answer. Table 23 describes the buttons on the Attachments tab toolbar.

Table 23: Attachments Tab Description

Button	Description
	Click this button to add a file attachment.
Browse	Select this option to browse for the location of the document you want to attach to the answer.
Search	Select this option to search for the document you want to attach to the answer.
	Click this button to delete the selected attachment.
	Click this button to view the file properties of the selected attachment. For information, refer to "Viewing attachment properties" on page 130.
	Click this button to download the file attachment. **Note:** You will be prompted to save the file attachment to the location you specify. A File Download window will open displaying the download progress.
	Click this button to open the file attachment.

When you attach a file to an answer, you can locate the file by browsing or searching. The following procedures describe each method.

Note You can attach an unlimited number of files to an answer, but each file can be no larger than 20 MB. Contact your RightNow administrator to learn if additional file size limitations exist on your system.

To browse for a file to attach to an answer:

1 Right-click the answer and select Edit.

2 Click the Attachments tab.

Path: Right-Click Answer>Edit>Attachments

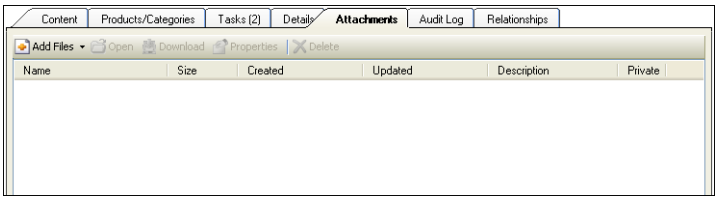


Figure 54: Attaching a File to an Answer

3 Click the Add Files button and select Browse. A window opens and displays the files and folders on your workstation.

Path: Right-Click Answer>Edit>Attachments>Add Files>Browse

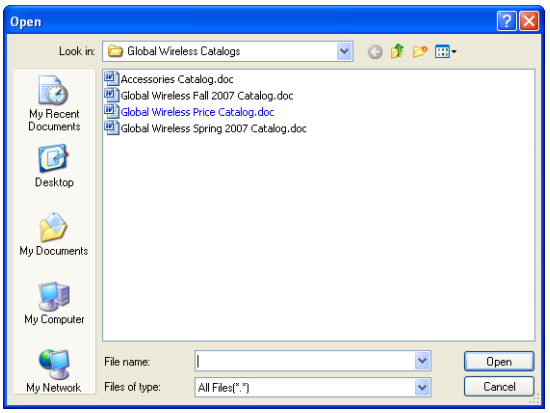


Figure 55: Browsing File Attachments Window

4 Select the file to attach.

5 To attach additional files, press **Ctrl** while selecting the files.

6 Click the Open button to attach the file to the answer.

To search for a file to attach to an answer:

1 Click the Attachments tab.

2 Click the Add Files button and select Search to open the File Search window.

Path: Right-Click Answer>Edit>Attachments>Add Files>Search

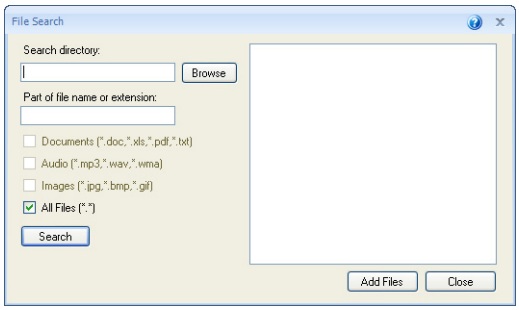


Figure 56: File Search Window

3 Enter any or all of the field information described in Table 24.

Table 24: File Search Window Description

Field	Description
Search directory	Type the name of the directory where you want to search for the file or click the Browse button.
Browse	Click this button to display the file structure and make a selection from the list of available directories.
Part of file name or extension	Type all or part of the file name. **Note:** This field uses an implicit wildcard at the end of the entry.
Documents (*.doc, *.xls, *.pdf)	Select this check box to search for document files.
Images (*.gif, *.jpg, *.bmp)	Select this check box to search for graphics files.
Audio (*.mp3, *.wav, *.wma)	Select this check box to search for audio files.
All Files (*.*)	Select this check box if you do not want to restrict the search by file type.

4 Click the Search button to display a list of files that meet the search criteria.

5 Click a file to select it for uploading.

6 To attach additional files to the answer, press **Ctrl** while selecting the files.

7 Click the Add Files button to upload the selected file and attach it to the answer.

8 Click the Close button to close the File Search window.

Viewing the list of attachments

The list of attachments contains columns that provide information about each attachment. Refer to Table 25 for a description of the columns in the list.

Table 25: List of Attachments Column Description

Column	Description
Name	This column displays the name of the file.
Size	This column displays the file size.
Created	This column displays the date and time the file was created
Updated	This column displays the date and time the file was updated.
Description	This column displays the description of the file attachment. You can define the description in the attachment's properties. For information about defining attachment properties, refer to "Viewing attachment properties" on page 130.
Private	This field displays the visibility of the attachment on the end-user interface. For information on the visibility of attachments on the end-user interface, refer to "Viewing attachment properties" on page 130.

Viewing attachment properties

You can view properties for answer file attachments. You can also add file information and designate whether to index the file.

To view attachment properties:

1 Select a file attachment from the list and click the Properties button on the Attachments tab toolbar.

Path: Right-Click Answer>Edit>Attachments>Select File>Properties

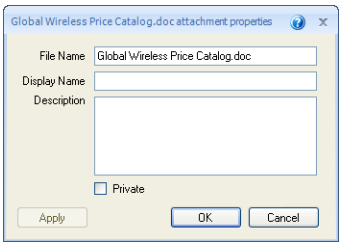


Figure 57: Viewing Attachment Properties

2 Enter field information described in Table 26.

Table 26: Attachment Properties Window Description

Field	Description
File Name	This field displays the file name. You can change the name of the file.
Display Name	Type the name you want the file to display as on the end-user interface.
Description	Type a description of the file to provide more information about it.
Private	Select this check box to make the attachment private. **Note:** Private attachments will not appear on the end-user interface.
Indexed	Select this check box to index the attachment. Text contained in the attachment will be searched when customers perform a search on the end-user interface.

3 To view your changes, click the Apply button.

4 Click the OK button to close the Attachment Properties window.

Viewing the answer audit log

RightNow Service automatically tracks all actions performed on an answer by staff members in your organization. The audit log contains a history of all modifications to the selected answer. This information is especially useful when more than one staff member edits the same answer. The Audit Log tab is shown in Figure 58.

Path: Right-Click Answer>Edit>Audit Log

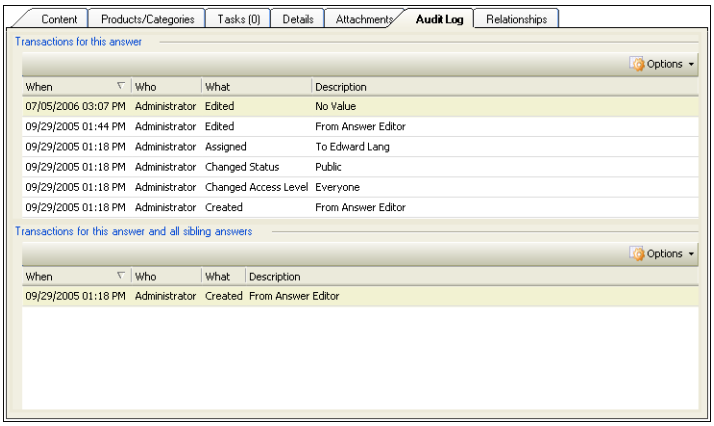


Figure 58: Audit Log Tab

Table 27 describes the information contained on the audit log.

Table 27: Audit Log Description

Column	Description
When	This column displays the date and time the action occurred.
Who	This column displays the staff member who performed the action.
What	This column displays the action performed.
Description	This column displays a description of the action, including what was modified.

◈ **Tip** You can click the column heading to sort the list by the selected column. Click the column heading again to reverse the sort.

Managing answer relationships

RightNow Service provides you with a Relationships functionality that allows you to relate one answer to other answers that contain similar content. This functionality also provides a way for you to group similar answers, improving the way you keep track of and update answers in your knowledge base. Answer relationships can be managed on the answer's Relationships tab. The answer relationship types available depend on the permissions set in your profile.

◇ **Tip** When two or more answers are related, you will be able to view the relationship from either of the answer's Relationships tab.

Sibling, manually related, and automatically related answers are displayed on the Relationships tab. The tab is divided into the following sections:

- Sibling(s)
- Manually Related
- Learned Links

Sibling answers are those that share the same product or category and may also contain the same file attachments. Manually related answers are two or more answers manually defined by a staff member. Learned links are answers that have learned relationships as a result of customer activity.

Note Manually related and learned links will be disabled when the answer type is set to either URL or File Attachment. For information on answer types, refer to "Adding answers" on page 109.

Path: Right-Click Answer>Edit>Relationships

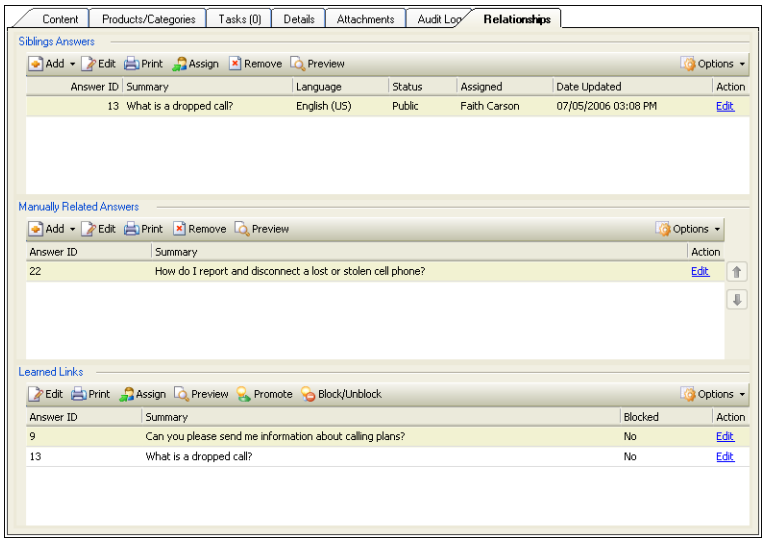


Figure 59: Answer Relationships Tab

Note Regardless of which type of answer relationships you work with, it is important to note that all relationships between answers are at a peer level and not at a subordinate level. For example, if you have three answers you want to relate (1, 2, and 3), you can relate 2 to 1 and 3 to 2. All three answers are peers, including answers 1 and 3.

The following sections describe each of the answer relationships.

Sibling answers

Sibling answers are those that share the same product or category, and can also contain the same file attachments. The Sibling(s) section of the Relationships tab consists of a toolbar and a list of sibling answers. The toolbar is located above the sibling answer list. Figure 60 shows the Sibling(s) section on the Relationships tab.

Path: Right-Click Answer>Edit>Relationships

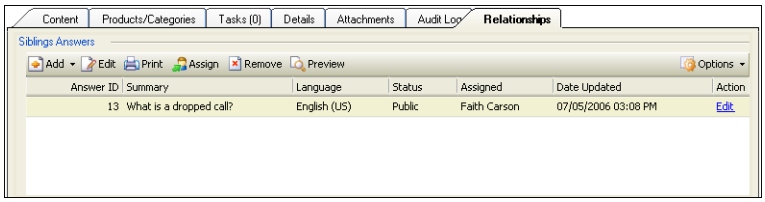


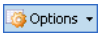
Figure 60: Answer Sibling(s) Section

Table 28 describes the buttons on the Sibling(s) section toolbar.

Table 28: Siblings Answers Section Toolbar Description

Button	Description
Add	Click this button and select one of the following options.
Add New	Select this option to add an answer and establish a sibling relationship between the current answer and the new answer.
Add Existing	Select this option to create a sibling relationship between the current answer and an existing answer. The Answer Search window will display to allow you to search for an existing answer. For more information about searching for answers, refer to "Searching for answers" on page 101.
Edit	Click this button to edit the selected sibling answer.
Print	Click this button to print the selected sibling answer.
Assign	Click this button to assign the selected sibling answer to a staff member. **Note:** You can assign the sibling answer to a staff member only if you have the permission set in your profile.
Remove	Click this button to remove the selected sibling answer.
Preview	Click this button to preview the selected sibling answer.

Table 28: Siblings Answers Section Toolbar Description (Continued)

Button	Description
	Click this button and select an option for displaying the sibling answer. Refer to the *RightNow 8.1 Analytics Manual* for information about report options.

The list in the Sibling(s) section contains answers that share the same product or category as the current answer. Refer to Table 29 for a description of this list.

Table 29: Sibling(s) List Description

Column	Description
Answer ID	This column displays the ID assigned to the answer.
Summary	This column displays a summary of the answer content. The summary is the answer's subject.
Language	This column displays the language of the answer.
Status	This column displays the status of the answer.
Assigned	This column displays the name of the staff member assigned to the answer.
Date Updated	This column displays the date the answer was last updated.
Action	Right-click the text in this column and select an action to perform on the selected answer. Actions include: • Add • Edit • Print • Remove • Preview • Options menu

Manually related answers

Manually related answers are two or more answers that may contain related answer information. Manually relating answers provides customers with additional options for finding accurate information.

The Manually Related section of the Relationships tab consists of a toolbar and a list of manually related answers. The toolbar is located above the manually related answer list. Figure 61 shows the Manually Related section on the Relationships tab.

Path: Right-Click Answer>Edit>Relationships

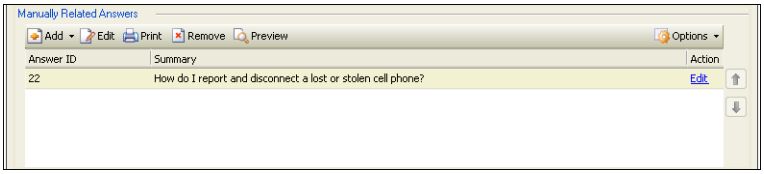


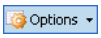
Figure 61: Manually Related Answers Section

Table 30 describes the buttons on the Manually Related section toolbar.

Table 30: Manually Related Answers Section Toolbar Description

Button	Description
Add	Click this button and select one of the following options.
Add New	Select this option to add an answer and establish a relationship between the current answer and the new answer.
Add Existing	Select this option to create a relationship between the current answer and an existing answer. The Answer Search window will display to allow you to search for an existing answer. For more information about searching for answers, refer to "Searching for answers" on page 101.
Edit	Click this button to edit the selected answer.
Print	Click this button to print the selected answer.
Remove	Click this button to remove the answer from the list.

Table 30: Manually Related Answers Section Toolbar Description (Continued)

Button	Description
	Click this button to preview the selected answer.
	Click this button and select an option for displaying the manually related answer. Refer to the *RightNow 8.2 Analytics Manual* for information about report options.

The list in the Manually Related section contains answers that may contain related answer information. Table 31 provides a description of this list.

Table 31: Manually Related List Description

Column	Description
Answer ID	This column displays the ID assigned to the answer.
Summary	This column displays a summary of the answer content. The summary is the answer's subject.
Action	Right-click the text in this column and select an action to perform on the selected answer. Actions include: • Add • Edit • Print • Remove • Preview • Options menu

Learned links

RightNow Service can automatically link answers based on customer activity. Relationships between answers are established when customers view answers in the same session.

Path: Right-Click Answer>Edit>Relationships

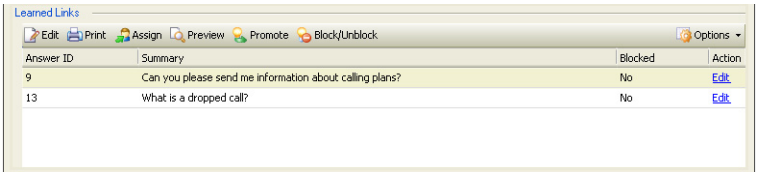


Figure 62: Learned Links Section

The Learned Links section of the Relationships tab consists of a toolbar and a list of learned answers. The toolbar is located above the learned links answer list. Table 32 describes the buttons on the Learned Links section toolbar.

Table 32: Learned Links Section Toolbar Description

Button	Description
Edit	Click this button to edit the selected answer.
Print	Click this button to print the selected answer.
Assign	Click this button to assign the selected sibling answer to a staff member. **Note:** You can assign the sibling answer to a staff member only if you have the permission set in your profile.
Preview	Click this button to preview the selected answer.
Promote	Click this button to promote the learned link to a manually related answer. The answer is added to the Manually Related list.
Block/Unblock	Click this button to block the answer from appearing in the Related Answers section on the end-user interface. To block more than one answer, press **Ctrl** while selecting each answer. **Note:** Click this button to allow a blocked answer to appear in the Related Answers section on the end-user interface.
Options	Click this button and select an option for displaying the sibling answer. Refer to the *RightNow 8.2 Analytics Manual* for information about report options.

The list in the Learned Links section contains answers that are related as a result of customer activity. All learned link answers are listed. Table 33 provides a description of this list.

Table 33: Learned Links List Description

Column	Description
Answer ID	This column displays the answer ID number.
Summary	This column displays a summary of the answer content. The summary is the answer's subject.
Blocked	This column displays the blocked mode of the answer link on the end-user interface. **Note:** If "No" displays, the answer link is not blocked on the end-user interface. If "Yes" displays, the answer link is blocked on the end-user interface.
Action	Right-click the text in this column and select an action to perform on the selected answer. Actions include: • Edit • Print • Assign • Preview • Promote • Block/Unblock • Options menu

◇ **Tip** Learned links will appear in the Related Answers section on the end-user interface when a customer views the answer if related answers are enabled. The number of learned links that display depend on how your site is configured.

Inserting hyperlinks

You can create a hyperlink in an answer that will link to a URL. When customers view an answer on the end-user interface that contains a hyperlink, they can click the hyperlink and be directed to either an internal or external URL.

To insert a hyperlink:

1 Right-click the answer on the content pane and select Edit.

2 Click the Hyperlink button on the toolbox.

Path: Right-Click Answer>Edit>Hyperlink

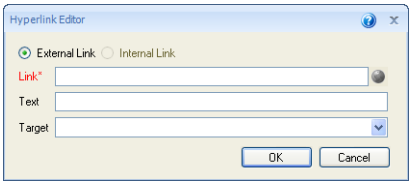


Figure 63: Hyperlink Editor

3 Enter field information described in Table 34.

Table 34: Hyperlink Editor Description

Field	Description
External Link	Select this radio button to add a link to an external web page. **Note:** The External Link radio button is selected by default.
Internal Link	Select this radio button to link to an answer. **Note:** You can also use RightNow Service's answer link functionality to link from one answer to another. For information, refer to "Inserting answer links" on page 148.
***Link**	Type a valid URL to the page you are linking to. **Note:** To verify the URL you typed is accurate, click the Open URL button (to the right of the Link field). A web browser window will open to the URL you specified. If you enter an invalid URL, an error message will open.
Text	Type the text you want to appear to customers other than the default text, "Click Here."
Target	Click this drop-down menu and select one of the following options.
New Window	Select this option to have the link open in a new window when the customer clicks the link on the end-user interface.
Same Window	Select this option to have the link open in the same window when the customer clicks the link on the end-user interface.

Table 34: Hyperlink Editor Description (Continued)

Field	Description
Parent Window	Select this option to have the link open in the parent window when the customer clicks the link on the end-user interface.
Browser Window	Select this option to have the link open in a browser window when the customer clicks the link on the end-user interface.

4 Click the OK button to insert the hyperlink at the cursor position in the current answer.

Inserting images

You can insert an image that is accessible through a URL in your HTML. You can also define the size of the image, its border properties, and alignment.

To insert an image:

1 Right-click the answer on the content pane and select Edit.

2 Click the Image button on the toolbox. The Image Editor opens.

Path: Right-Click Answer>Edit>Image

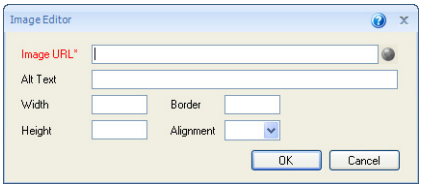


Figure 64: Image Editor

3 Enter field information described in Table 35.

Table 35: Image Editor Description

Field	Description
***Image URL**	Type the URL where the image is located.
Open URL	Click this button to open the URL in a web browser.

Table 35: Image Editor Description (Continued)

Field	Description
Alt Text	Type the alternative text for the image.
Width	Type the width, in pixels, you want the image to appear as.
Height	Type the height, in pixels, you want the image to appear as.
Border	Type the width, in pixels, of the image's border.
Alignment	Click this drop-down menu to select the image's alignment: Left, Middle, Right, Top, or Bottom.

4 Click the OK button to insert the image.

Inserting tables

You can insert a table in your HTML and define the number of rows or columns, and its border properties, cell padding, and cell spacing.

To insert a table:

1 Right-click the answer on the content pane and select Edit.

2 Click the Table button on the toolbox. The Insert Table window opens.

Path: Right-Click Answer>Edit>Table

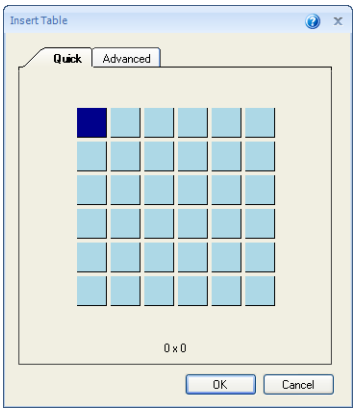


Figure 65: Insert Table Window

3 On the Quick tab, click and drag on the grid to define the number of rows and columns in the table.

4 Click the Advanced tab.

Path: Right-Click Answer>Edit>Table>Advanced

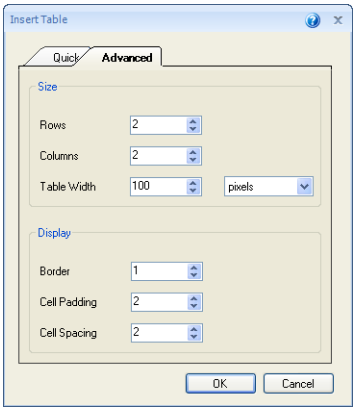


Figure 66: Advanced Tab on the Insert Table Window

5 Enter field information described in Table 36.

Table 36: Advanced Tab on the Insert Table Window Description

Field	Description
Size	Define the size of the table in this section.
Rows	Enter the number of rows in the table.
Columns	Enter the number of columns in the table.
Table Width	Enter the width of the table and select the unit from the drop-down menu (for example, pixels).
Display	Define the table's attributes in this section.
Border	Enter the width, in pixels, of the table's border.
Cell Padding	Enter the padding, in pixels, of the table's cells.
Cell Spacing	Enter the spacing, in pixels, of the table's cells.

6 Click the OK button to insert the table.

7 To edit the table's properties, right-click the table and select Table Properties. The Table Editor opens.

Path: Right-Click Answer>Edit>Right-Click Table>Table Properties

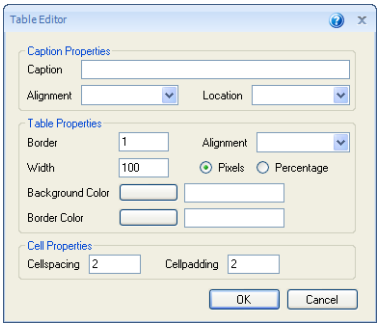


Figure 67: Table Editor

a Enter field information described in Table 37.

Table 37: Table Editor Description

Field	Description
Caption Properties	Define the table's caption in this section.
Caption	Type the caption of the table.
Alignment	Click this drop-down menu to select the alignment of the caption. Your choices are Left, Centered, and Right.
Location	Click this drop-down menu to select the location of the caption in relation to the table. Your choices are Top and Bottom.
Table Properties	Define the table's attributes in this section.
Border	Type the width, in pixels, of the table's border.
Alignment	Click this drop-down menu to select the alignment of the table on the page. Your choices are Left, Centered, and Right.
Width	Type the width of the table and select the unit from the radio buttons (Pixels or Percentage).
Background Color	Click this box to select a color for the table's background.
Border Color	Click this box to select a color for the table's borders.
Cell Properties	Define the table's attributes in this section.
Cellspacing	Type the spacing, in pixels, of the table's cells.
Cellpadding	Type the padding, in pixels, of the table's cells.

b Click the OK button to save your changes.

8 To edit a cell's properties, right-click the table cell and select Cell Properties. The Cell Properties window opens.

Path: Right-Click Answer>Edit>Right-Click Table Cell>Cell Properties

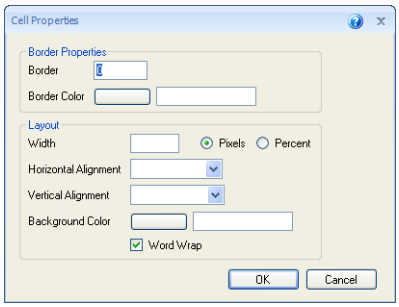


Figure 68: Cell Properties Window

a Enter field information described in Table 38.

Table 38: Cell Properties Window Description

Field	Description
Border Properties	Define the cell's border properties in this section.
Border	Type the width of the cell's border in pixels.
Border Color	Click this box to select a color for the cell's borders.
Layout	Fill in the following fields to specify the cell's layout properties.
Width	Type the width of the cell and select the Pixels or Percentage radio button.
Horizontal Alignment	Click this drop-down menu to select the horizontal alignment of the text in the cell. Your choices are Left, Centered, Right, and Justify.
Vertical Alignment	Click this drop-down menu to select the vertical alignment of the text in the cell. Your choices are Top, Middle, Bottom, and Baseline.
Background Color	Click this box to select a color for the cell's background.
Word Wrap	Select this check box to allow text to wrap in the cell.

b Click the OK button to save your changes.

Inserting answer links

You can create a link in an answer that references an existing answer. RightNow Service provides you with the flexibility to easily create links to existing answers by using the answer ID number. This feature enables you to create a link without typing a long URL to the answer.

To insert an answer link:

1 Right-click the answer on the content pane and select Edit.

2 Click the Insert Answer Link button.

Path: Right-Click Answer>Edit>Insert Answer Link

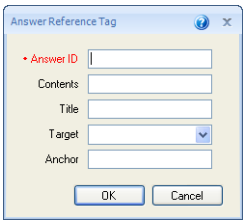


Figure 69: Answer Reference Tag Window

3 Enter field information described in Table 39.

Table 39: Answer Reference Tag Window Description

Field	Description
***Answer ID**	Type the answer ID of the answer you want to link to.
Contents	Type the text you want to appear to customers other than the default text, "Click Here."
Title	Type the text you want to appear to customers when they mouse over the link title.
Target	Type the target location where you want the contents of the link to display. **Note:** If you want the answer to open in the current window, leave this field blank. If you want the answer to open in a new window, type "open window."

Table 39: Answer Reference Tag Window Description (Continued)

Field	Description
Anchor	Type the anchor in this field to link to a specific location in a long string of text in an answer. This allows the customer to link to the exact location. For information on adding an anchor to the answer you want to link to, refer to "Managing anchors" on page 149.

4 Click the OK button to insert the answer link at the cursor position in the current answer.

Managing anchors

When you insert an answer link, you may also need to insert an anchor in the answer you are linking to if you want the answer link to open to a specific location within the answer. For example, you may have an answer that contains several paragraphs of text, but the first paragraph does not contain information that will answer the customer's question. With RightNow's Manage Anchors functionality, you can quickly link to a specific location.

To insert an anchor:

1 Right-click the answer on the content pane and select Edit.

2 Insert the cursor in the exact location of the answer you want to link to.

3 Click the Manage Anchors button on the toolbox.

Path: Right-Click Answer>Edit>Insert Cursor>Manage Anchors

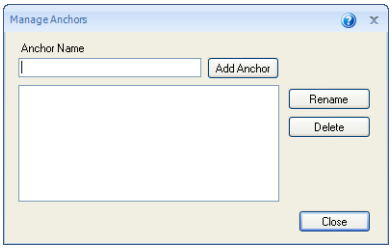


Figure 70: Manage Anchors Window

4 Type a name for the anchor in the Anchor Name field.

5 Click the Add Anchor button to add the anchor at the cursor position in the answer.

6 To delete an anchor, select the anchor and click the Delete button.

7 To rename an anchor, select the anchor and click the Rename button.

8 Click the Close button to save the anchor and close the Manage Anchors window.

Associating answers with multiple access levels

You can associate multiple access levels with an answer. If any of the access levels have customer visibility, the answer will be visible on the end-user interface. In addition, you can control the answers returned in a customer's search by assigning them SLAs that allow privileged access to specific answers. For example, a customer assigned an SLA with Gold access will be able to view all answers with the assigned access levels of Gold, Everyone, or Gold and Everyone.

Access levels are just one way of controlling answer visibility. For information on other ways to control answer visibility, refer to "Controlling answer visibility" on page 83.

To associate an answer with multiple access levels:

1 Right-click the answer on the content pane and select Edit.

2 Click the Access Level drop-down menu and select the check box next to each access level you want to assign to the answer.

Path: Right-Click Answer>Edit>Multi-Select Access Levels

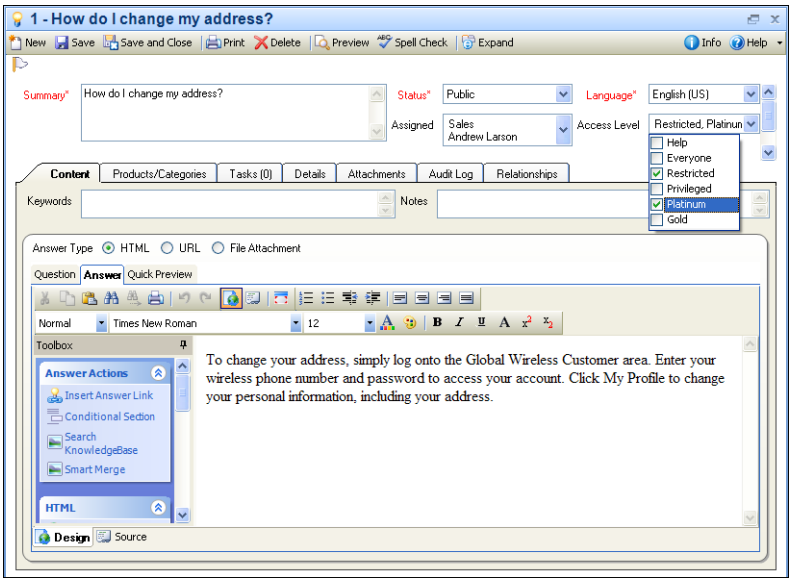


Figure 71: Associating Multiple Access Levels

◈ **Tip** To view the answer how customers will see it on the end-user interface, click the Quick Preview tab.

3 Click the Save and Close button to save your changes and close the answer.

Conditional sections overview

With RightNow Service, you have the ability to tag parts of an answer with different access levels. Using conditional sections enables you to control the visibility of specific sections within your answers. One scenario for using conditional sections is when you are working on an answer and you want to add information that is not yet approved for public visibility. You can create an access level that has no end-user visibility and assign it to the conditional section you do not want customers to view.

Conditional sections can also be used with privileged access levels assigned to specific SLAs. Those customers assigned an SLA with a privileged access level will be able to view the conditional sections assigned to the privileged access level. For example, a customer assigned an

SLA with Gold access will be able to view conditional sections with access levels of Gold, Everyone, or Gold and Everyone. This provides more flexibility to customize and personalize answers for customers.

Conditional sections can also be nested. For example, you may have an answer in your knowledge base with access levels of Platinum and Silver. You could create a conditional section with an assigned access level of Platinum. In that conditional section, you could also create a nested section with an access level of Silver. Only customers with privileged access to both Platinum and Silver access level answers will be able to view all Platinum and Silver nested sections. Customers with privileged access to Platinum access level answers will be able to view the answer and all Platinum nested sections because Platinum is the outermost section. However, a customer with only Silver access level permissions will be able to view the answer but not any of the nested sections because the outermost section is associated with an access level the customer does not have permissions to view.

Important RightNow allows unlimited nesting levels. However, we strongly recommend that you limit the nesting levels to three inner sections.

Inserting conditional sections

You can add conditional sections to your answers that will appear only to customers who have access to the assigned access level(s) for the answer and for each conditional section.

To insert a conditional section:

1. Right-click the answer on the content pane and select Edit. By default, the Question tab is active.
2. To add your conditional section to the answer portion, click the Answer tab.
3. Click the Conditional Section button on the toolbox.

Path: Right-Click Answer>Edit>Conditional Section

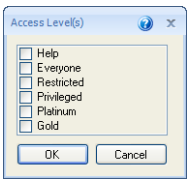


Figure 72: Access Level(s) Window

4. Select the access level(s) you want to assign to the conditional section.

5 Click the OK button. The Conditional Section text box will appear on the active tab on the Content tab.

Path: Right-Click Answer>Edit>Conditional Section>Select Access Level(s)>OK

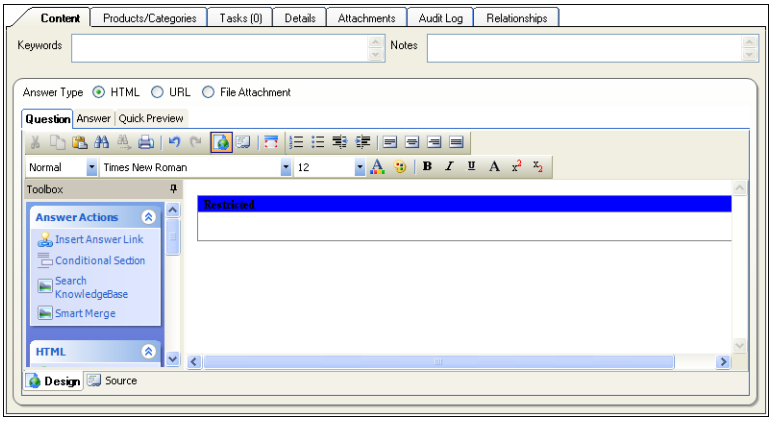


Figure 73: Conditional Section Text Box

Important When conditioning a section of an answer with an access level not associated with the answer, the section will never be visible to customers.

6 Type the information in the Conditional Section text box.

7 Click the Save button to save the answer with the conditional section.

Tip You can see how the answer will appear to customers with different access levels on the end-user interface using the Preview functionality. Refer to "Previewing answers" on page 168.

To edit conditional sections:

1 To edit the text of a conditional section, click the conditional section and type your text in the Access Level Conditional text box.

2 To nest a conditional section in the current conditional section, click inside the answer section, and then click the Conditional Section button on the Toolbox. Refer to "Inserting conditional sections" on page 152.

3 To change the access level, double-click the conditional section to open the Access Level(s) window and select the access level or multiple access levels.

4 Click the OK button to assign the selected access level(s) and close the Access Level(s) window.

5 Click the Save and Close button to save your changes to the answer.

Merging answers

In RightNow Service, you can effectively manage the answers in your knowledge base by merging similar answers or merging the content of one answer with another answer. In addition, merging answers will also merge any conditional sections. Conditional sections will display as text in the appropriate fields of the answer. For information on conditional sections, refer to "Conditional sections overview" on page 151.

This section contains procedures for merging answers and merging answer content.

Merging answers using Smart Merge

Answers can be merged with similar answers found in the knowledge base using the Smart Merge feature. Smart Merge allows staff members to identify similar answers and merge them. Merging answers provides your customers with more complete information and can help you eliminate duplicate answers.

RightNow Service also includes functionality to merge answer content. For more information, refer to "Merging answer content" on page 158.

To merge similar answers:

1 Right-click the answer on the content pane and select Edit.

2 Click the Smart Merge button on the toolbox.

Path: Right-Click Answer>Edit>Smart Merge

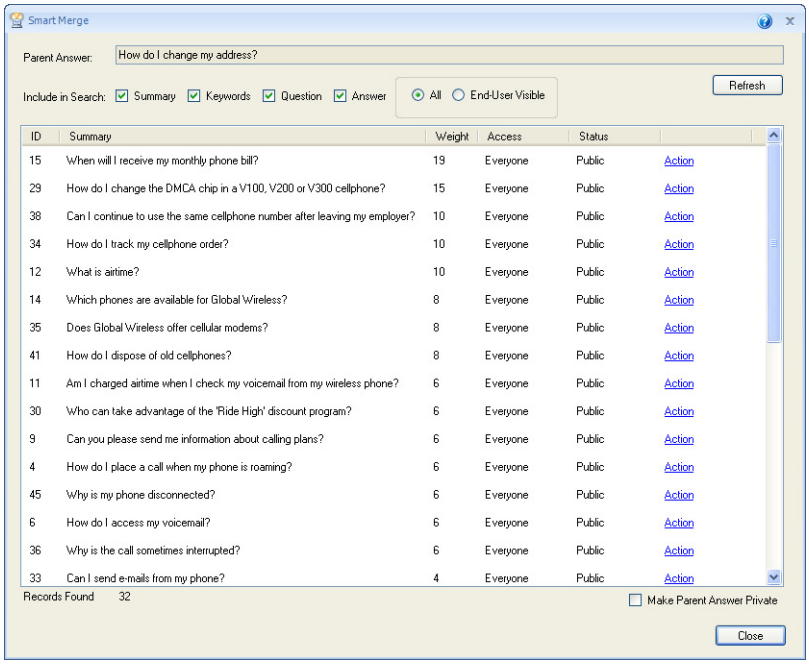

Smart Merge
Parent Answer: How do I change my address?
Include in Search: Summary Keywords Question Answer All End-User Visible
Refresh
ID Summary Weight Access Status
15 When will I receive my monthly phone bill? 19 Everyone Public Action
29 How do I change the DMCA chip in a V100, V200 or V300 cellphone? 15 Everyone Public Action
38 Can I continue to use the same cellphone number after leaving my employer? 10 Everyone Public Action
34 How do I track my cellphone order? 10 Everyone Public Action
12 What is airtime? 10 Everyone Public Action
14 Which phones are available for Global Wireless? 8 Everyone Public Action
35 Does Global Wireless offer cellular modems? 8 Everyone Public Action
41 How do I dispose of old cellphones? 8 Everyone Public Action
11 Am I charged airtime when I check my voicemail from my wireless phone? 6 Everyone Public Action
30 Who can take advantage of the 'Ride High' discount program? 6 Everyone Public Action
9 Can you please send me information about calling plans? 6 Everyone Public Action
4 How do I place a call when my phone is roaming? 6 Everyone Public Action
45 Why is my phone disconnected? 6 Everyone Public Action
6 How do I access my voicemail? 6 Everyone Public Action
36 Why is the call sometimes interrupted? 6 Everyone Public Action
33 Can I send e-mails from my phone? 4 Everyone Public Action
Records Found 32
Make Parent Answer Private
Close

Figure 74: Smart Merge Window

3 Enter field information described in Table 40.

Table 40: Smart Merge Window Description

Field	Description
Parent Answer	This field displays the summary of the open answer. For information on answer relationships, refer to "Managing answer relationships" on page 133. **Note:** The parent answer is the current answer you are merging an answer to.
Include in Search	Define your search criteria with any of the following areas of the answer. **Note:** All options are selected by default.
Summary	Select this check box to search the Summary field for answers you can merge.

Table 40: Smart Merge Window Description (Continued)

Field	Description
Key words	Select this check box to search the Keywords field for answers you can merge.
Question	Select this check box to search the Question field for answers you can merge.
Answer	Select this check box to search the Answer field for answers you can merge.
All	Select this radio button to return all answers, regardless of status.
End-User Visible	Select this radio button to return only public answers.
Make Parent Answer Private	Select this check box to make the answer Private.

4 Click the Refresh button. The results will display on the Smart Merge window.

◈ **Tip** Smart Merge performs the search based on the search criteria specified on the Smart Merge window. The results display matched answers sorted by relevance.

Path: Right-Click Answer>Edit>Smart Merge>Refresh

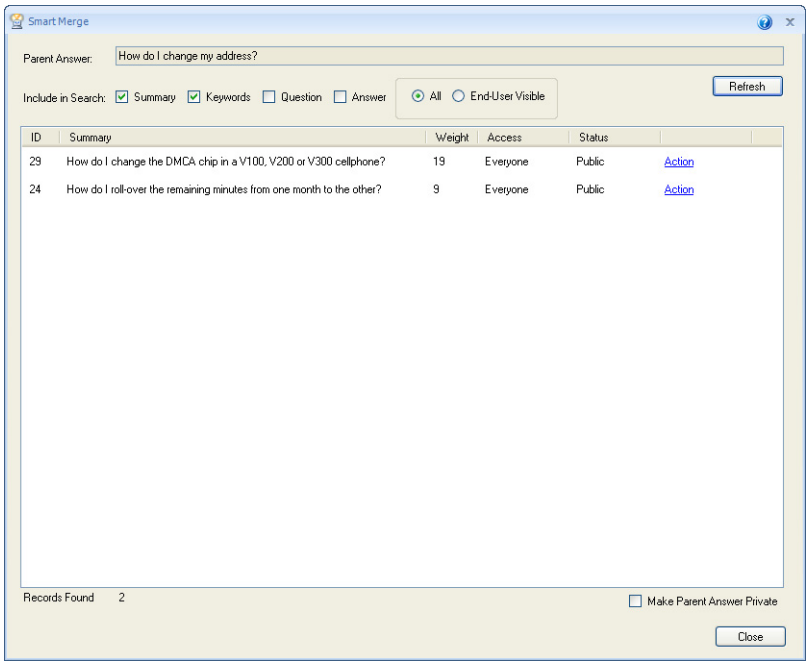


Figure 75: Smart Merge Search Results

5 Click Action next to each answer you want to merge, and select from the merge options described in Table 41.

Table 41: Merge Answer Options

Option	Description
Merge	Select this option to merge the answer with the answer you are editing.
Merge and Delete	Select this option to merge the answer and then delete the answer once it has been merged. **Caution!** Selecting this option will permanently delete the selected answer from the knowledge base. Use caution when selecting this option.
Merge and Make Private	Select this option to merge the answer and set the status to Private. A warning will prompt you to verify the action.

Table 41: Merge Answer Options (Continued)

Option	Description
Show	Select this option to view the answer in a separate window before you merge it with the answer you are editing.
Cancel	Select this option to cancel the current selection.

◈ **Tip** Once you select an option, the underlined text next to the answer will change. For example, if you select Merge, the text will change from Action to Merged.

6 Click the Close button to close the window and return to the answer.

Path: Right-Click Answer>Edit>Smart Merge>Refresh>Select Action>Close

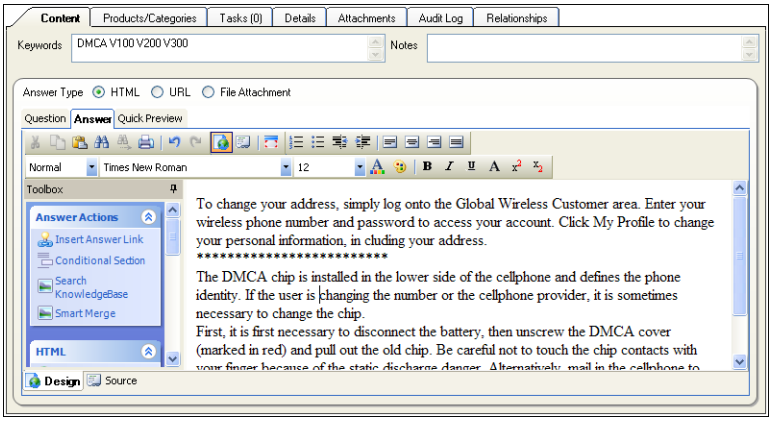

Content
Products/Categories
Tasks (0)
Details
Attachments
Audit Log
Relationships
Keywords
DMCA V100 V200 V300
Notes
Answer Type
HTML
URL
File Attachment
Question
Answer
Quick Preview
Normal
Times New Roman
12
Toolbox
Answer Actions
Insert Answer Link
Conditional Section
Search KnowledgeBase
Smart Merge
HTML
To change your address, simply log onto the Global Wireless Customer area. Enter your wireless phone number and password to access your account. Click My Profile to change your personal information, in cluding your address.
****
The DMCA chip is installed in the lower side of the cellphone and defines the phone identity. If the user is changing the number or the cellphone provider, it is sometimes necessary to change the chip.
First, it is first necessary to disconnect the battery, then unscrew the DMCA cover (marked in red) and pull out the old chip. Be careful not to touch the chip contacts with
Design
Source

Figure 76: Merged Answers Designation

◈ **Tip** To view the merged answer as it will appear on the end-user interface, click the Quick Preview tab.

Merging answer content

In addition to merging similar answers, you can also search for other answers in the knowledge base while editing an answer and merge the content of answers. You can append the answer link or the answer text to the answer you are editing. The appended answer will appear in the specified section.

To merge answer content:

1 Right-click the answer on the content pane and select Edit.

2 Click the Search Knowledge Base button on the toolbox. The Search Knowledge Base window will open.

Path: Right-Click Answer>Edit>Search Knowledge Base

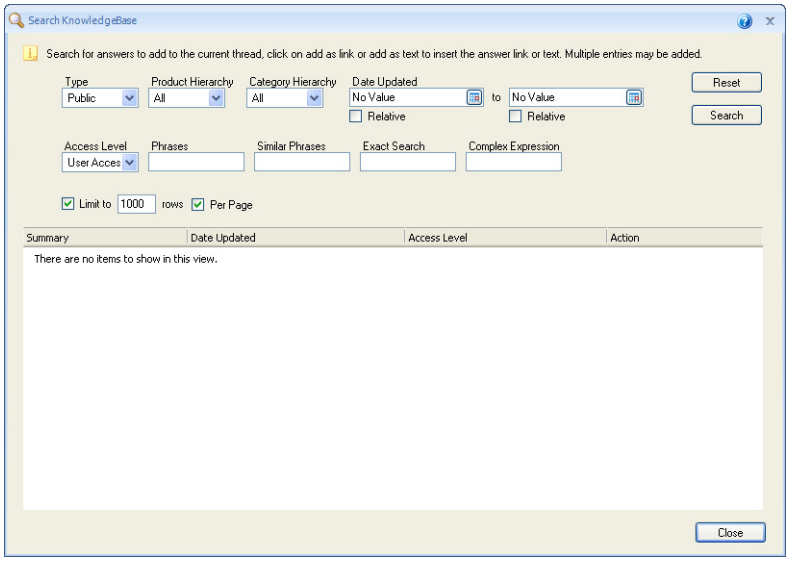


Figure 77: Search Knowledge Base Window

3 Enter your search criteria in the appropriate field(s) and click the Search button. Refer to "Searching for answers using search and selection criteria" on page 101 for a description of each selection criteria.

Path: Right-Click Answer>Edit>Search Knowledge Base>Search Criteria>Search

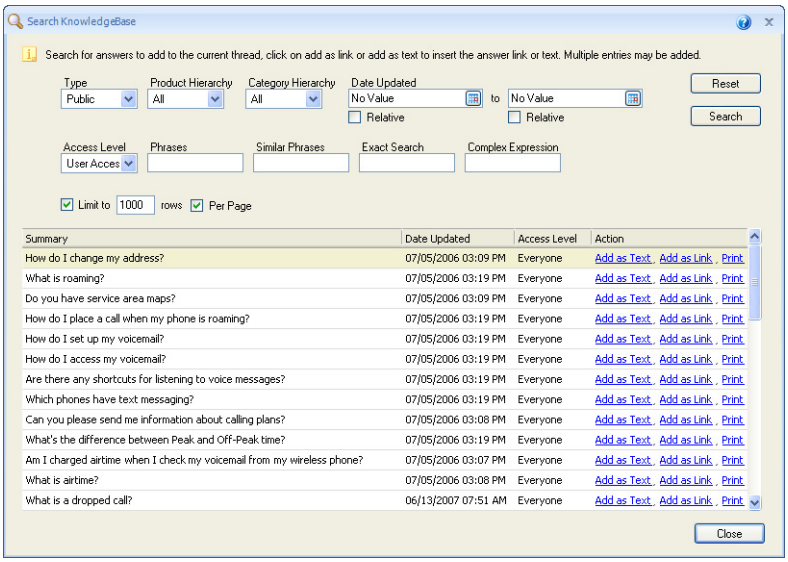

Search KnowledgeBase
Search for answers to add to the current thread, click on add as link or add as text to insert the answer link or text. Multiple entries may be added.
Type
Public
Product Hierarchy
All
Category Hierarchy
All
Date Updated
No Value
to
No Value
Relative
Relative
Reset
Search
Access Level
User Acces
Phrases
Similar Phrases
Exact Search
Complex Expression
Limit to 1000 rows
Per Page
Summary
Date Updated
Access Level
Action
How do I change my address? 07/05/2006 03:09 PM Everyone Add as Text , Add as Link , Print
What is roaming? 07/05/2006 03:19 PM Everyone Add as Text , Add as Link , Print
Do you have service area maps? 07/05/2006 03:09 PM Everyone Add as Text , Add as Link , Print
How do I place a call when my phone is roaming? 07/05/2006 03:19 PM Everyone Add as Text , Add as Link , Print
How do I set up my voicemail? 07/05/2006 03:19 PM Everyone Add as Text , Add as Link , Print
How do I access my voicemail? 07/05/2006 03:19 PM Everyone Add as Text , Add as Link , Print
Are there any shortcuts for listening to voice messages? 07/05/2006 03:19 PM Everyone Add as Text , Add as Link , Print
Which phones have text messaging? 07/05/2006 03:19 PM Everyone Add as Text , Add as Link , Print
Can you please send me information about calling plans? 07/05/2006 03:08 PM Everyone Add as Text , Add as Link , Print
What's the difference between Peak and Off-Peak time? 07/05/2006 03:19 PM Everyone Add as Text , Add as Link , Print
Am I charged airtime when I check my voicemail from my wireless phone? 07/05/2006 03:07 PM Everyone Add as Text , Add as Link , Print
What is airtime? 07/05/2006 03:08 PM Everyone Add as Text , Add as Link , Print
What is a dropped call? 06/13/2007 07:51 AM Everyone Add as Text , Add as Link , Print
Close

Figure 78: Answer Search Results

4 To append an answer link to the answer you are editing, click Add as Link next to the answer. The answer title and a link to the answer will be appended to the selected field of the answer at the cursor position.

5 To append the answer text to the answer you are editing, click Add as Text. The text of the answer will be appended to the selected field of the answer at the cursor position.

◈ **Tip** To view the answer as it will appear on the end-user interface, close the Search Knowledge Base window and click the Quick Preview tab.

6 Click the Save and Close button to save and close the answer.

Editing answers and related answers

You can edit answers and related answers, including sibling, manually related, and learned links. When you edit an answer, you can also change the information in related answers, but keep in mind that editing answers can affect other answers associated with it. You can also edit multiple answers at one time (refer to "Editing multiple answers" on page 162).

To edit an answer:

1 Right-click the answer on the content pane and select Edit.

Path: Right-Click Answer>Edit

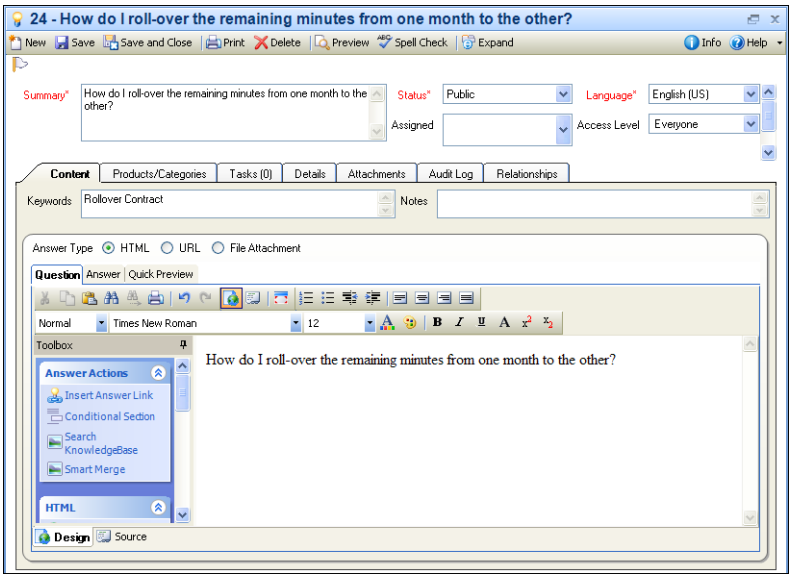


Figure 79: Editing an Answer

2 To change the answer type, select the radio button next to the answer type. For information, refer to "Adding answers" on page 109.

Caution When you change the answer type in an existing answer, all answer relationships and certain answer fields will be removed. Use caution when changing an answer's type.

3 Edit the answer fields as described in Table 15 on page 97.

4 To search the answer for a word or phrase to replace, click the Find Text button on the HTML toolbar. The Find and Replace window opens.

5 Edit the fields on each of the answer record tabs as described in Table 16 on page 99.

6 To notify answer subscribers of the edit, click the Details tab, and then click the Notify Subscribers drop-down menu and select from the following options: Do Not Notify, This Hour, End of Today, End of this Week, End of this Month.

7 Click the Save and Close button to save your changes and close the answer.

To edit a related answer:

1 Right-click the answer on the content pane and select Edit.

2 Click the Relationships tab.

Path: Right-Click Answer>Edit>Relationships

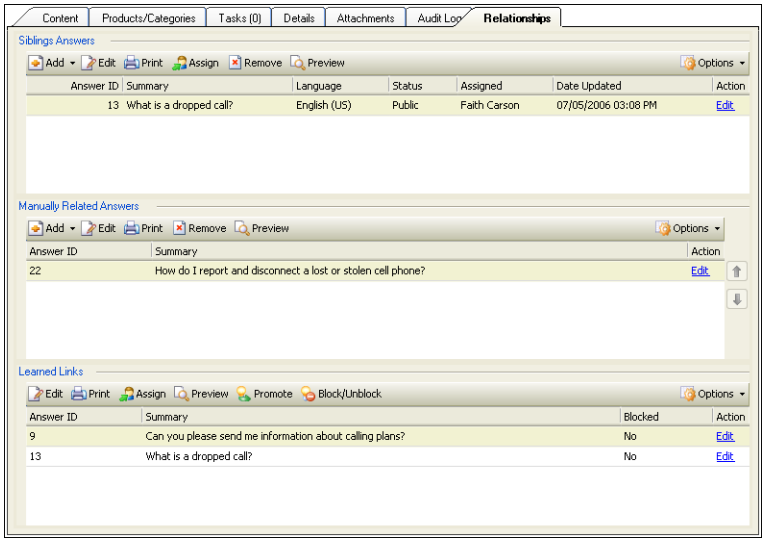


Figure 80: Editing a Related Answer

3 Click Edit next to the answer you want to edit. The related answer will open in a new window.

4 Make the appropriate changes.

5 Click the OK button.

6 Click the Save and Close button to save your changes and close the answer.

Note Editing a related answer will affect all answers associated with it.

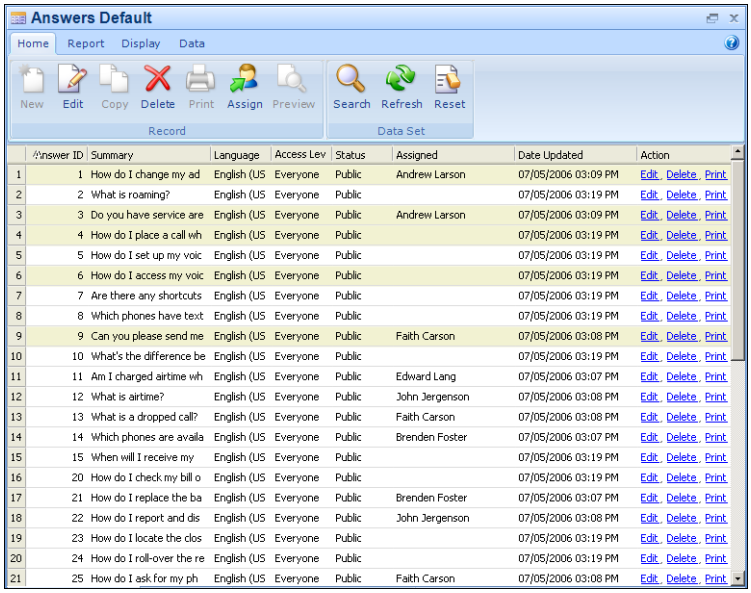
Editing multiple answers

RightNow Service allows you to edit more than one answer at the same time and edit various fields such as status, assigned staff member, review and publish on dates, products, categories, and custom fields. This feature saves you time when you want to make the same change to multiple answers. For example, you might want to change the status of several answers to Public.

To edit multiple answers:

1 Press **Ctrl** while selecting each answer on the content pane that you want to update.

Path: Ctrl+Select Answers



	Answer ID	Summary	Language	Access Lev	Status	Assigned	Date Updated	Action
1	1	How do I change my ad	English (US	Everyone	Public	Andrew Larson	07/05/2006 03:09 PM	Edit, Delete, Print
2	2	What is roaming?	English (US	Everyone	Public		07/05/2006 03:19 PM	Edit, Delete, Print
3	3	Do you have service are	English (US	Everyone	Public	Andrew Larson	07/05/2006 03:09 PM	Edit, Delete, Print
4	4	How do I place a call wh	English (US	Everyone	Public		07/05/2006 03:19 PM	Edit, Delete, Print
5	5	How do I set up my voic	English (US	Everyone	Public		07/05/2006 03:19 PM	Edit, Delete, Print
6	6	How do I access my voic	English (US	Everyone	Public		07/05/2006 03:19 PM	Edit, Delete, Print
7	7	Are there any shortcuts	English (US	Everyone	Public		07/05/2006 03:19 PM	Edit, Delete, Print
8	8	Which phones have text	English (US	Everyone	Public		07/05/2006 03:19 PM	Edit, Delete, Print
9	9	Can you please send me	English (US	Everyone	Public	Faith Carson	07/05/2006 03:08 PM	Edit, Delete, Print
10	10	What's the difference be	English (US	Everyone	Public		07/05/2006 03:19 PM	Edit, Delete, Print
11	11	Am I charged airtime wh	English (US	Everyone	Public	Edward Lang	07/05/2006 03:07 PM	Edit, Delete, Print
12	12	What is airtime?	English (US	Everyone	Public	John Jergenson	07/05/2006 03:08 PM	Edit, Delete, Print
13	13	What is a dropped call?	English (US	Everyone	Public	Faith Carson	07/05/2006 03:08 PM	Edit, Delete, Print
14	14	Which phones are availa	English (US	Everyone	Public	Brenden Foster	07/05/2006 03:07 PM	Edit, Delete, Print
15	15	When will I receive my	English (US	Everyone	Public		07/05/2006 03:19 PM	Edit, Delete, Print
16	20	How do I check my bill o	English (US	Everyone	Public		07/05/2006 03:19 PM	Edit, Delete, Print
17	21	How do I replace the ba	English (US	Everyone	Public	Brenden Foster	07/05/2006 03:07 PM	Edit, Delete, Print
18	22	How do I report and dis	English (US	Everyone	Public	John Jergenson	07/05/2006 03:08 PM	Edit, Delete, Print
19	23	How do I locate the clos	English (US	Everyone	Public		07/05/2006 03:19 PM	Edit, Delete, Print
20	24	How do I roll-over the re	English (US	Everyone	Public		07/05/2006 03:19 PM	Edit, Delete, Print
21	25	How do I ask for my ph	English (US	Everyone	Public	Faith Carson	07/05/2006 03:08 PM	Edit, Delete, Print

Figure 81: Multi-Selecting Answers

2 Click the Edit button on the report ribbon.

Note Figure 82 shows the standard workspace for working with multiple answers. Your workspace may be different if your RightNow administrator configured a custom workspace for working with multiple answers.

Path: Ctrl+Select Answers>Edit

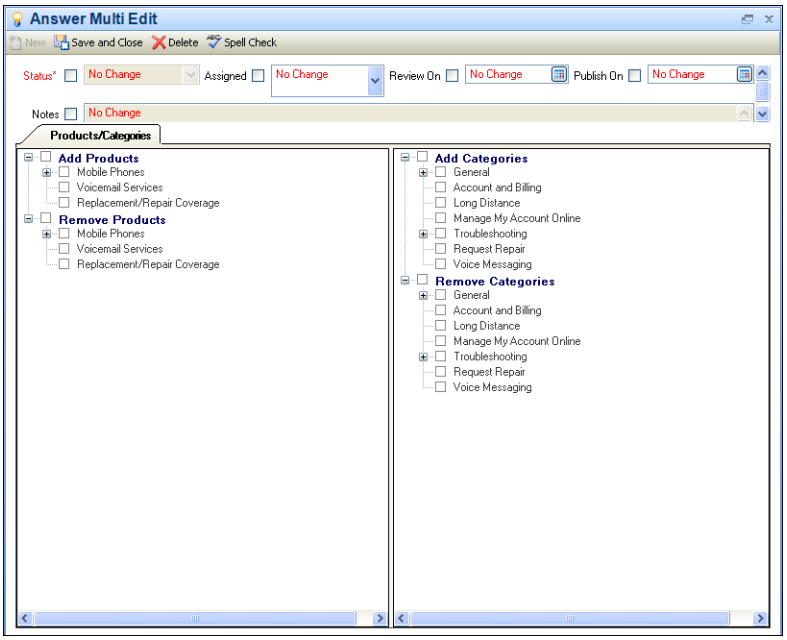


Figure 82: Editing Multiple Answers

3 Enter field information described in Table 42.

Table 42: Edit Multiple Answers Description

Field	Description
Status	Click this drop-down menu to select an answer status.
Assigned	Click this drop-down menu to select a staff member to assign the answers to.
Review On	Click this drop-down menu to select a date to review the answers.
Publish On	Click this drop-down menu to select a date to publish the answers.
Notes	Type any notes you want to include with the answers.

Table 42: Edit Multiple Answers Description (Continued)

Field	Description
Custom Fields	Click this tab and fill in any custom fields defined by your RightNow administrator. **Note:** Only Radio, Menu, Date, and Date/Time type custom fields are available when you edit multiple answers. The Custom Fields tab will not appear if you do not have the appropriate permissions defined in your profile.
Products/Categories	Click this tab to associate products and categories with the answers. **Note:** Regardless of which products or categories are associated with an individual answer, when you edit multiple answers, no products or categories are selected.

4 Click the Save and Close button to save your changes and close the answers.

Inserting variables in answers

Answer variables are predefined shortcuts for entering information in an answer instead of a long string of text. When an answer is displayed on the end-user interface, the variable is replaced with whatever value was specified by your RightNow administrator.

Variables are also helpful to use for information that may change. When your RightNow administrator changes the value of the variable, all answers containing that variable will also change.

To insert a variable in an answer:

In the Question or Answer field of an answer, type a dollar sign ($) followed by the variable name. For example, suppose you want to add a "contact" variable for a support email address at your organization. Instead of typing the email address every time, you can add the address as a variable. If the email address changes, all answers containing the "contact" variable will be updated.

$Contact

The assigned value will be displayed when customers view the answer.

Important Because variables are case sensitive, you must type the variable name exactly as it is defined. For a detailed description of the variables available, contact your RightNow administrator.

Copying answers

You can copy an existing answer to make a new answer or sibling answer. When copying an answer, you can have the same language, access level, and status, or change any of these fields.

To copy an answer:

1 Right-click the answer on the content pane and select Copy.

Path: Right-Click Answer>Copy

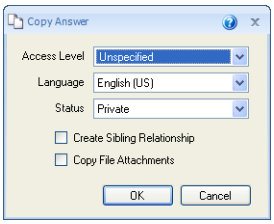


Figure 83: Copy Answer Window

2 Select an access level for the new answer from the Access Level drop-down menu.

3 Select a language for the new answer from the Language drop-down menu.

4 Select a status for the new answer from the Status drop-down menu.

5 To create a sibling relationship between the answer and the copy of the answer, select the Create Sibling Relationship check box.

6 To include a copy of all the files attached to the answer, select the Copy File Attachments check box.

7 Click the OK button. The new answer will be an exact copy of the original answer, except for any changes to the access level, language, or status fields. The answer will open with a new summary: [answer summary] (Copy of Answer ID).

Deleting answers

You can delete answers from RightNow Service when they become outdated. However, use extreme caution when deleting answers because deleting an answer will also delete all associated relationships.

⚠Caution Deleting is permanent and cannot be undone.

To delete an answer:

1 Right-click the answer on the content pane and select Delete.

Path: Right-Click Answer>Delete

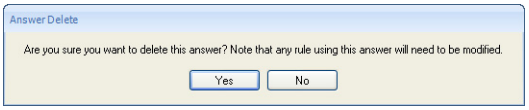

Answer Delete
Are you sure you want to delete this answer? Note that any rule using this answer will need to be modified.
Yes
No

Figure 84: Confirm Answer Deletion

2 Click the Yes button to delete the answer.

Printing answers

You can create a printable version of your answers in RightNow Service. When using this function, the answer opens in a new window. The print command is then launched through your web browser and you can choose to print the contents of the page.

To print an answer:

1 Right-click the answer on the content pane and select Print.

Path: Right-Click Answer>Print

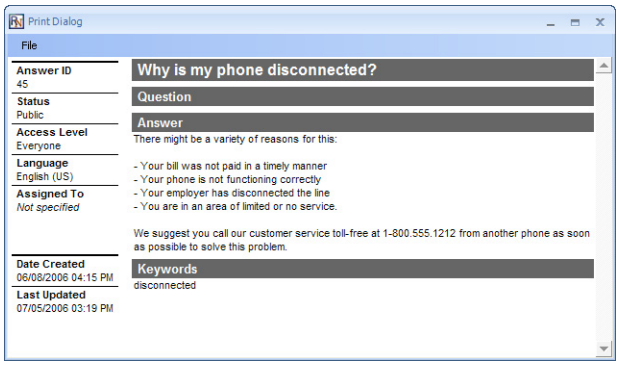


Figure 85: Printing an Answer

2 Click File and select Print.

3 Print the answer according to your web browser's print menu.

Previewing answers

Before making an answer available to customers, you can preview it on the end-user interface to ensure everything is accurate. You can verify that the answer and answer sections appear as you anticipated by viewing the answer with different access levels selected. For information on answer visibility, refer to "Controlling answer visibility" on page 83.

To preview an answer:

1 Right-click the answer on the content pane and select Preview.

Path: Right-Click Answer>Preview

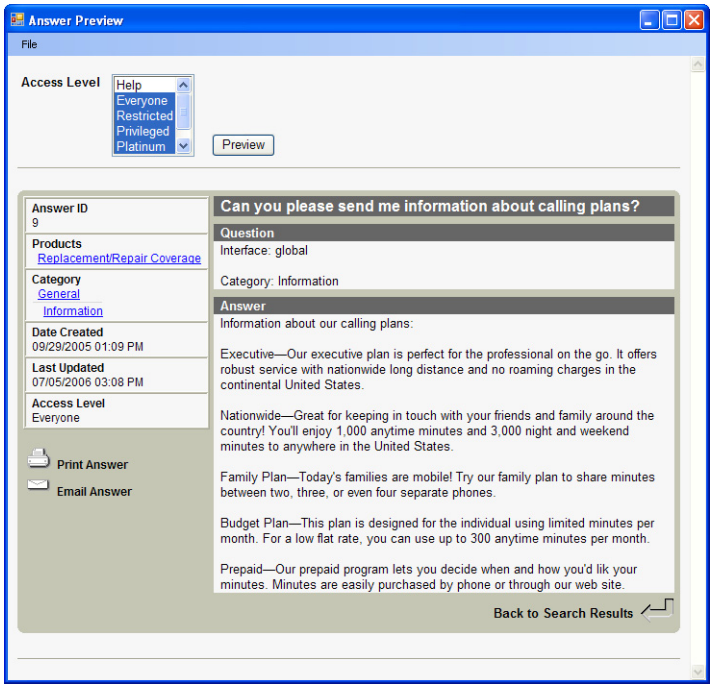

Answer Preview
File
Access Level
Help
Everyone
Restricted
Privileged
Platinum
Preview
Answer ID
9
Products
Replacement/Repair Coverage
Category
General
Information
Date Created
09/29/2005 01:09 PM
Last Updated
07/05/2006 03:08 PM
Access Level
Everyone
Print Answer
Email Answer
Can you please send me information about calling plans?
Question
Interface: global
Category: Information
Answer
Information about our calling plans:
Executive—Our executive plan is perfect for the professional on the go. It offers robust service with nationwide long distance and no roaming charges in the continental United States.
Nationwide—Great for keeping in touch with your friends and family around the country! You'll enjoy 1,000 anytime minutes and 3,000 night and weekend minutes to anywhere in the United States.
Family Plan—Today's families are mobile! Try our family plan to share minutes between two, three, or even four separate phones.
Budget Plan—This plan is designed for the individual using limited minutes per month. For a low flat rate, you can use up to 300 anytime minutes per month.
Prepaid—Our prepaid program lets you decide when and how you'd lik your minutes. Minutes are easily purchased by phone or through our web site.
Back to Search Results

Figure 86: Previewing an Answer

Select the access level(s) from the Access Level selection menu and click the Preview button. Only the sections of the answer with the selected access level(s) will appear on the Answer Preview window. Figure 87 on page 169 shows the conditional sections associated with the selected access level Platinum.

Path: Select Access Level(s)>Preview

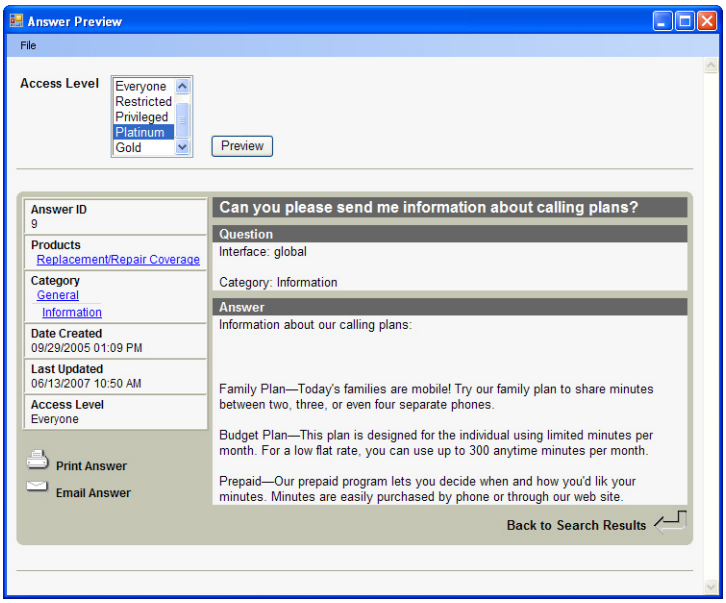


Figure 87: Answer Preview with Selected Access Level

4

RightNow Live

While self-service and email response management can solve the majority of customer issues, Live assistance remains the best venue for certain queries such as helping customers complete web forms and finalize purchases. As a RightNow Live agent, you can serve customers in real time through typed conversation or telephone callback. While chatting, standard text allows you to send prepared responses to customers, offering a faster response time.

Note This chapter describes the features and functionality of RightNow 8.1 Live. This is the original version of RightNow Live available in RightNow 8.1 and prior releases. If you have upgraded to RightNow 8.2, you can continue to use this original version of RightNow Live, or a newer version, RightNow 8.2 Live. Refer to the *RightNow 8.2 Live Administrator and User Manual*, available for download through our customer community for RightNow 8.2 Live documentation. The original RightNow Live (8.1) described in this chapter uses a different interface than the newer version (8.2). Refer to Figure 88 on page 173 to view the original RightNow Live interface.

In this chapter

- **Agent applet overview**—Contains the procedure for opening the agent applet, along with a description of its features for managing chat sessions, monitoring other agents, and changing options. Refer to page 172.
- **Client overview**—Contains a description of the two customer clients and the process by which customers request a chat request. Refer to page 184.
- **Chatting with a customer**—Contains the procedure for agents to engage in a chat session. Refer to page 190.
- **Using agent chat tools**—Contains procedures for chatting with another agent, using standard responses and URLs, transferring a chat, conferencing another agent into a chat, searching for suggested answers, accessing customer history, and collaborating with customers. Refer to page 195.
- **Creating incidents from chat sessions**—Contains the procedure for creating an incident from a chat session. Refer to page 212.

Agent applet overview

The agent applet is the interface on the RightNow Console where you chat with customers. The agent applet is divided into sections containing agent, user wait queue, responses and URLs tabs, system statistics, and customer chat information. From the agent applet, you can manage your chat sessions, engage in Live chats, and access RightNow Live features to help you answer customer questions. You can also view the status of customers in the wait queue, including queue position and wait time.

Opening the agent applet

After your RightNow administrator has configured your profile with the proper permissions and the Chat Home component has been added to your navigation set, Chat Home will appear in the Communications Center navigation list. The amount of information displayed on the agent applet depends on the Live permissions set in your profile.

Note To use the agent applet, it is mandatory that the Java Runtime Environment (JRE) be installed on your workstation. When you initially open the agent applet, the JRE will automatically install on your workstation. If you have problems installing the JRE, contact your RightNow administrator.

To open the agent applet:

1 Click the Communication Center button on the navigation pane.

2 Double-click Chat Home in the navigation list. The agent applet opens on the content pane.

Note Figure 88 on page 173 shows the agent applet with full Live profile permissions. Depending on the Live permissions set in your profile, you may not have all available options and may not see all system statistics.

Path: Communications Center>Chat Home

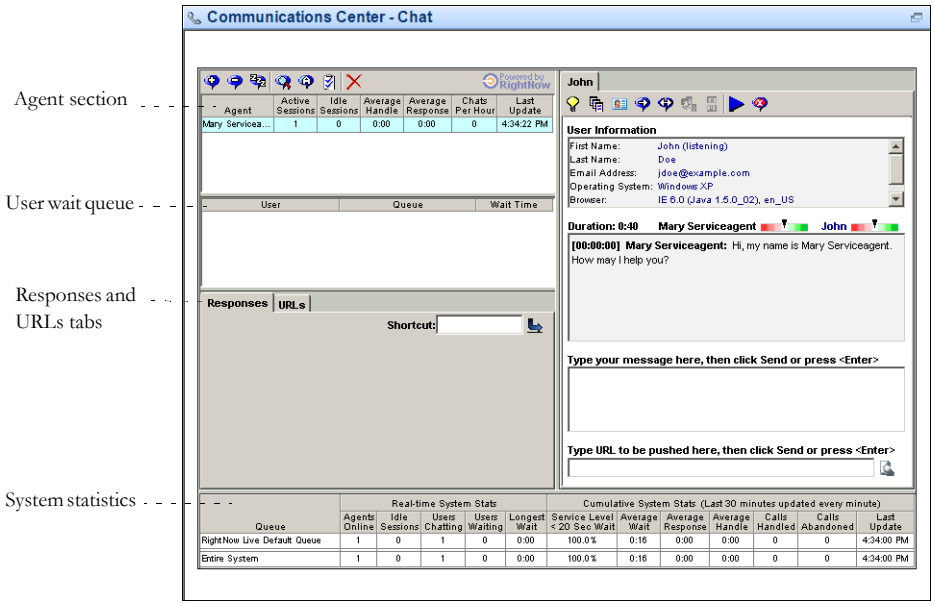


Figure 88: Agent Applet Layout

Agent section

The agent section contains options for managing your Live sessions, monitoring another agent's chat, chatting with another agent, and logging out. This section also lists each agent logged in and their individual chat activity during the lookback time. You can resize and change the order of the columns on the agent section; however, when you log out and log in again, the columns return to their default size and order.

Table 43 describes the options and information available on the agent section.

Table 43: Agent Applet–Agent Section Description

Button/Column	Description
Increase	Click this button to increase the number of chats you can engage in. For information, refer to "Managing your chat sessions" on page 180. **Note:** Your RightNow administrator can increase or decrease the maximum number of chat sessions you can engage in.

Table 43: Agent Applet–Agent Section Description (Continued)

Button/Column	Description
Decrease	Click this button to decrease the number of chats you can engage in. For information, refer to "Managing your chat sessions" on page 180.
Sleep	Click this button to stop receiving chat requests. For information, refer to "Managing your chat sessions" on page 180.
Monitor	Click this button to select a chat session to monitor. Once you click this button, a list of available sessions is displayed. For information, refer to "Monitoring other agents' chats" on page 181. **Note:** To access this function, you must have monitor permissions assigned in your profile. If not, this button will be disabled.
Agent-to-Agent Chat	Click this button to chat with another agent. Once you click this button, a list of available agents is displayed. For information, refer to "Chatting with another agent" on page 195.
Options	Click this button to change the send, sound, pull next chat, and spell check options on the agent applet. For information, refer to "Changing agent default settings" on page 175.
Log Out	Click this button to close the agent applet. **Note:** If you have chats in progress, a message will inform you to close the chats before closing the agent applet.
Powered by RightNow	Place your cursor over the RightNow logo to display the version of RightNow Live.
Agent	This column displays the staff members logged in as RightNow Live agents. **Note:** Place your cursor over an agent's name to display the chat session queue(s) the agent is assigned to.
Active Sessions	This column displays the number of chats the agent is currently engaged in.
Idle Sessions	This column displays the number of chats the agent is available to take.
Average Handle	This column displays the average length of time it takes for an agent to finish a chat session.

Table 43: Agent Applet–Agent Section Description (Continued)

Button/Column	Description
Average Response	This column displays the agent's average response time per message.
Chats per Hour	This column displays the agent's chats per hour.
Last Update	This column displays the time agent information was last updated.

Changing agent default settings

As you chat with customers, you can change certain settings on the agent applet to help you provide the most effective assistance possible. You can choose a default for the key(s) you press when sending message text, disable the audible tone that alerts you to an incoming chat request, and disable spell check.

Note Setting changes will stay in effect until you close the agent applet.

To change your agent settings:

1 Click the options button on the agent section.

2 Select from the options described in Table 44.

Table 44: Agent Settings Description

Option	Description
Send Shortcut	Select this option to change the way you send messages to customers. By default, pressing **Enter** or clicking  will send a message, but you can also configure the agent applet to send a message by pressing **Ctrl+s**.
Sound	Select this option to enable or disable the incoming alert sound. **Note:** The default sound notification on the agent applet (Windows default beep) is activated only when a customer initially submits a chat request. Any correspondence with the customer after that point does not result in sound notifications. To change the default sound notification, refer to Answer ID 1736 at http://rightnow.custhelp.com.

Table 44: Agent Settings Description (Continued)

Option	Description
Pull Next Chat	Select this option to enable or disable the Pull Next Chat button. For information, refer to "Pulling chats from the wait queue" on page 180.
Spell Check	Select this option to enable or disable spell check.

User wait queue

The user wait queue displays the names of customers in each queue and how long they have been waiting for an agent. All user wait queue statistics are reported in real time. You can resize and change the order of the columns on the user wait queue; however, when you log out and log in again, the columns return to their default size and order.

Table 45 describes the information on the user wait queue.

Table 45: Agent Applet–User Wait Queue Description

Column	Description
User	This column lists the first and last names of all customers in the queue.
Queue	This column lists the queue each customer is waiting in.
Wait Time	This column displays the length of time each customer has been in the wait queue.

Responses and URLs tabs

The Responses and URLs tabs show RightNow Live standard responses and URLs that have been defined by your RightNow administrator. You can click a folder and then double-click any response or URL and automatically include it in your chat session. For more information, refer to "Inserting standard responses and URLs" on page 196.

System statistics

The system statistics contain real-time and cumulative statistics of RightNow Live activity. The Real-Time System Stats grid displays the current state of each queue and of all queues combined. The Cumulative System Stats grid also reports on system activity of each queue and all queues combined. Cumulative system statistics are updated, by default, every minute and over a span of the past thirty minutes. The system stats settings can be configured by your RightNow administrator.

Table 46 describes the system statistics displayed on the agent applet.

Table 46: Agent Applet–System Statistics Description

Column	Description
Real-Time System Stats	This grid displays the following information (in real time) about the current state of each queue and all queues combined.
Queue	This column lists each chat session queue. RightNow Live has one default queue (RightNow Live Default Queue). **Note:** Place your cursor over a queue name to display the agents assigned to the queue.
Agents Online	This column shows how many agents are logged in and assigned to each queue and how many agents are logged in across all queues.
Idle Sessions	This column shows how many available sessions exist for each queue and the total number of available sessions across all queues.
Users Chatting	This column shows how many customers are engaged in chat sessions with agents.
Users Waiting	This column shows how many customers are waiting to have their chat request accepted by an agent.
Longest Wait	This column shows the amount of time that a customer has been in each queue.
Cumulative System Stats	This grid reports on system activity of individual queues and all queues combined (entire system) over the last 30 minutes and is updated, by default, every minute.

Table 46: Agent Applet–System Statistics Description (Continued)

Column	Description
Service Level	This column shows whether agents are meeting their default response requirements. The number indicates what percentage of calls are being answered in a certain amount of time (default is 20 seconds). This is compared to the service level requirement (SVL_PCT) and will turn red when the percentage falls below the requirement.
Average Wait	This column shows the average amount of time customers waited in queue before receiving their first response from an agent.
Average Response	This column shows the average message response time for all agents in the queue.
Average Handle	This column shows the average time spent by all agents in the queue to handle a complete chat session.
Calls Handled	This column shows the number of calls handled by all agents in the queue.
Calls Abandoned	This column shows the number of calls that were abandoned by customers before being taken by an agent.
Last Update	This column shows the time the system stats activity was last updated.

Chat section

The chat section is where active chats take place. It contains dialog and chat management tools for answering questions and solving customers' issues. Tabs at the top enable you to navigate between customer chat sessions. Buttons below the tabs enable you to quickly access the chat management tools for assisting customers. The chat section also shows customer information, chat duration, and SmartSense rating for both customer and agent.

Important When you first open the agent applet, the chat section will be blank and will remain that way until you engage in a chat session or monitor another agent's chat.

Table 47 describes your options on the chat section.

Table 47: Agent Applet–Chat Section Description

Field/Button	Description
SmartAssistant	Click this button to display suggested answers from the RightNow Service knowledge base. Refer to "Accessing SmartAssistant suggested answers" on page 200.
Pages Viewed	Click this button to display a list of the pages the customer viewed in RightNow before requesting a Live chat. Refer to "Viewing customer session information" on page 201.
Contact Search	Click this button to open the Contact Search window, which enables you to search for additional information about the customer you are chatting with. Refer to "Accessing customer history" on page 202. **Note:** This feature is not available during agent-to-agent chat.
Transfer	Click this button to transfer the customer to another agent. Refer to "Transferring a chat to another agent" on page 203.
Conference	Click this button to conference another agent into your chat. Refer to "Conferencing another agent into your chat" on page 205.
Collaborate	Click this button to collaborate with the customer. Refer to "Collaborating with a customer" on page 208. **Note:** If collaboration is not enabled, this button will be disabled.
Collaboration Control	When collaborating with a customer, click this button to toggle control of the web page between you and the customer. Refer to "Collaborating with a customer" on page 208 for information about this feature. **Note:** This button is disabled until you initiate a collaboration session.
Send	Click this button to send your response to the customer. You can also press **Enter**.
Disconnect	Click this button to disconnect from the chat session. **Note:** This ends the chat session only. The agent applet will remain open.

Managing your chat sessions

Each agent can handle a configurable number of concurrent chat sessions to maximize productivity. Once you open the agent applet, you are automatically available for one Live chat session. You can then add additional chat sessions depending on how your RightNow administrator has configured RightNow Live.

To manage your chat sessions:

1. To add another session, click the Increase button. This will allow you to conduct multiple chats at the same time. Each time you click this button, the number in your Idle Sessions column increases by one, meaning that you are available for an additional chat.

2. To decrease the number of sessions you are available for, click the Decrease button. Each time you click this button, the number in your Idle Sessions column decreases by one.

3. To make yourself unavailable for future chat sessions, click the Sleep button. This will not affect your active sessions (sessions in which you actively chatting with a customer).

Pulling chats from the wait queue

By default, chats are automatically assigned to you, but this functionality is configurable. If your RightNow administrator enables the pull next chat feature, you can manually "pull" chat requests from the user wait queue.

Important When this feature is enabled, the Increase and Decrease buttons () on the agent applet are replaced with the Pull Next Chat button (

) and the Accept/Decline chat invitation prompt will not be displayed. Figure 89 shows the location of the Pull Next Chat button.

Path: Chat Home

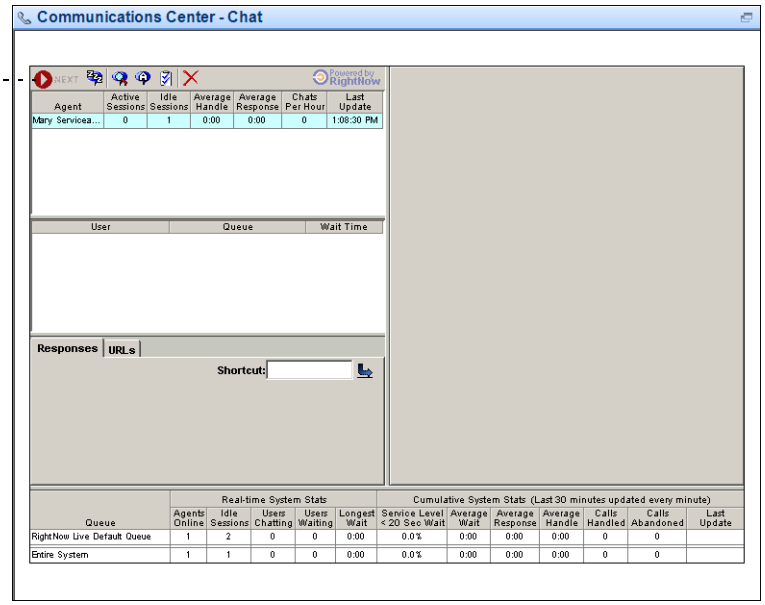


Figure 89: Pull Next Chat Button

Important If the Idle Sessions column is set to zero, you are required to pull all incoming chats by clicking the Pull Next Chat button. If the Idle Sessions column is set to 1 and you are not engaged in any chats, an incoming chat will automatically open for you. If you are already engaged in a chat, the incoming chat will not automatically open until you disconnect from the current chat session.

Monitoring other agents' chats

If your profile includes monitor permissions, you can view other agents' active chat sessions and assist them as necessary. When you monitor a chat session, you can find suggested answers for the chat session based on the chat dialog and send messages to the agent being monitored. And before you monitor a session, you can view the customer's SmartSense rating. This can help you gauge the tone of the chat session before viewing the actual dialog between the agent and the customer.

Tip The chat section on the right side of the agent applet will be blank before you engage in a chat session or monitor another agent's chat.

To monitor a Live chat:

1 Click the Monitor button to display a list of agents currently engaged in chat. Other agents must be chatting before you can monitor a chat. If no agents are chatting, a message will notify you that there are no agents to monitor.

2 Click a customer's name to open the chat to monitor. This will display the agent's active chat session, along with the customer SmartSense rating and a field where you can type a message to the agent who is engaged in the chat session.

Note Agents will not be aware their chat session is being monitored unless you send them a message.

Path: Chat Home>Monitor>Click Customer Name

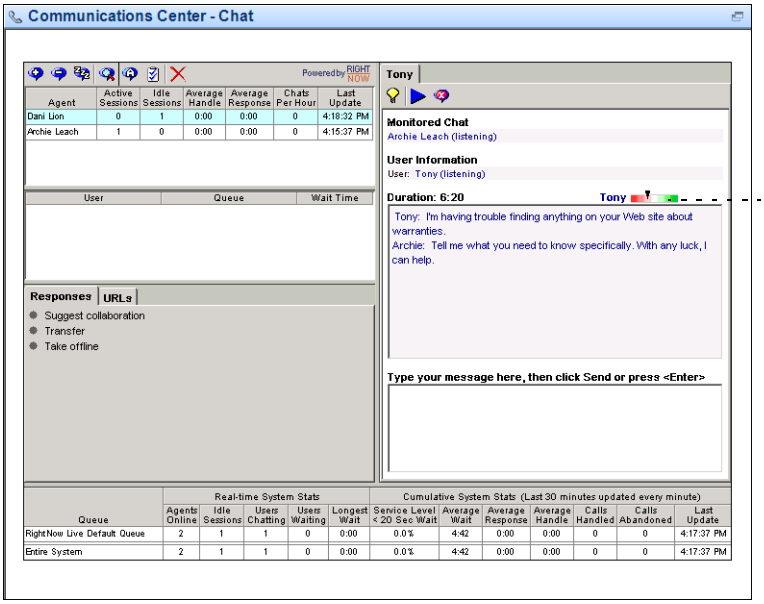


Figure 90: Monitoring a Chat

3 To communicate with the agent, type a message and click the Send button.

Note Customers will not receive messages you send to the agent engaged in the chat. Also, these messages will not be added to the discussion thread if an incident is created from the chat session. For more information, refer to "Creating incidents from chat sessions" on page 212.

4 To ask SmartAssistant to suggest answers that may answer the customer's question, click the SmartAssistant button and suggest an answer to the agent.

5 Click the Disconnect button to close the monitored chat.

Client overview

Two customer clients are available in RightNow Live: the Java client and the thin client. The client that is used depends on how your RightNow administrator has configured RightNow Live and the web browser used by customers. This section describes each client.

Java client

The Java client is the default Java applet interface for RightNow Live. The Java client must be used when RightNow Live collaboration is enabled, or when a customer requests to chat from a web browser other than Internet Explorer. The Java client is larger than the thin client and requires that the Java plug-in be installed on the customer's computer.

The following sequence of events explains what customers will see when submitting a chat request using the Java client.

1 From the Live Assistance page, the customer clicks the Submit Request button. For information on the Live Assistance page, refer to "Live Assistance" on page 260.

2 The Java client opens on the customer's computer and begins to search for an available agent.

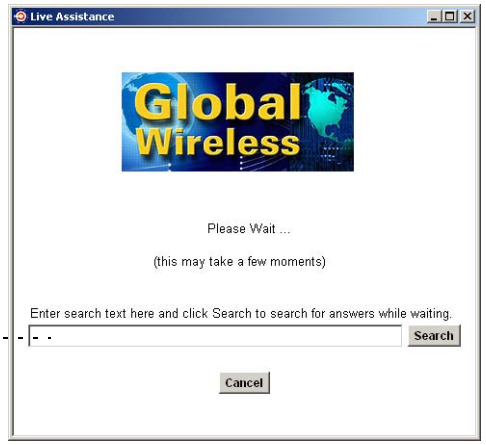

Live Assistance
Global Wireless
Please Wait ...
(this may take a few moments)
Enter search text here and click Search to search for answers while waiting.
Search
Cancel
The customer can search for answers in the knowledge base while waiting for an agent.

Figure 91: Java Client Searching for Agent

◈ **Tip** If all agents are busy, the customer will be placed in the wait queue and a number will display their position.

3 An agent accepts the chat request and begins chatting with the customer.


Live Assistance
Global Wireless
You are connected to
Mary Serviceagent (listening)
Chat Dialog
Mary Serviceagent: Hi, my name is Mary Serviceagent. How may I help you?
Type your message here, then click Send or press <Enter>
Send
Hang Up

Figure 92: Customer Interface using the Java Client

4 If the agent sends suggested answers or pushes URLs to the Java client, both will open in a *separate* web browser.

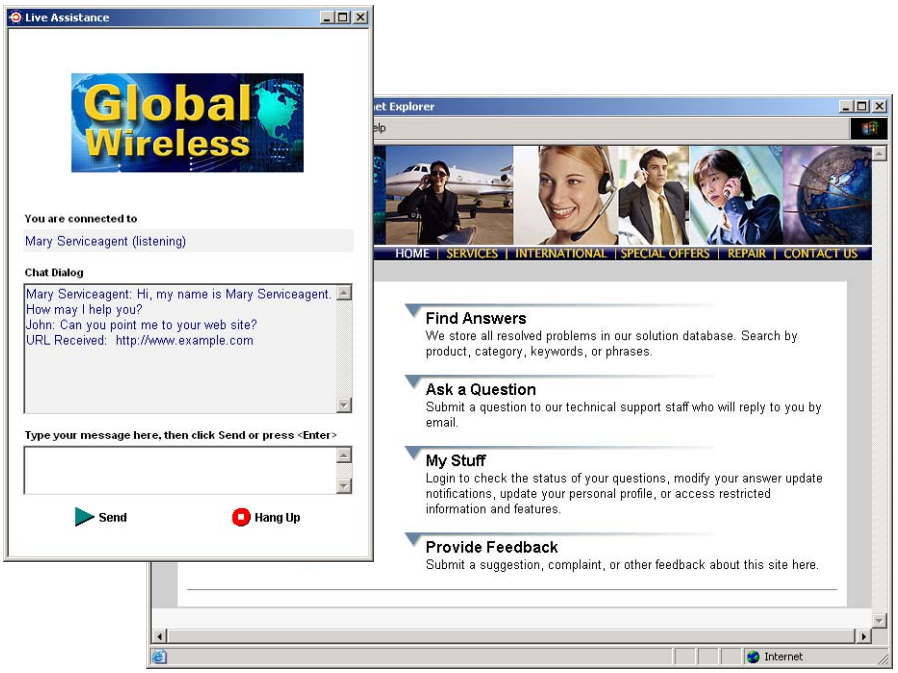

Live Assistance
Global Wireless
You are connected to
Mary Serviceagent (listening)
Chat Dialog
Mary Serviceagent: Hi, my name is Mary Serviceagent. How may I help you?
John: Can you point me to your web site?
URL Received: http://www.example.com
Type your message here, then click Send or press <Enter>
Send
Hang Up
HOME | SERVICES | INTERNATIONAL | SPECIAL OFFERS | REPAIR | CONTACT US
Find Answers
We store all resolved problems in our solution database. Search by product, category, keywords, or phrases.
Ask a Question
Submit a question to our technical support staff who will reply to you by email.
My Stuff
Login to check the status of your questions, modify your answer update notifications, update your personal profile, or access restricted information and features.
Provide Feedback
Submit a suggestion, complaint, or other feedback about this site here.
Internet

Figure 93: Java Client with Pushed URL Opening in Separate Browser

Thin client

The thin client does not use Java to communicate with RightNow Live. Instead, the thin client uses HTML (hypertext markup language) and JavaScript within a PHP web page. By using HTML and JavaScript, the thin client does not depend on a Java plug-in. It requires less time to load than the Java client and renders HTML sent by Live agents.

With the thin client, you can send marked-up text (HTML), which allows you to emphasize text with bold typeface or display an image to customers. To send marked-up text, you must type HTML code in the chat section, or send a standard response containing HTML code.

The following sequence of events explains what customers will see when submitting a chat request using the thin client.

1 From the Live Assistance page, the customer clicks the Submit Request button.

2 The thin client searches for an available agent and the customer is placed in the wait queue.

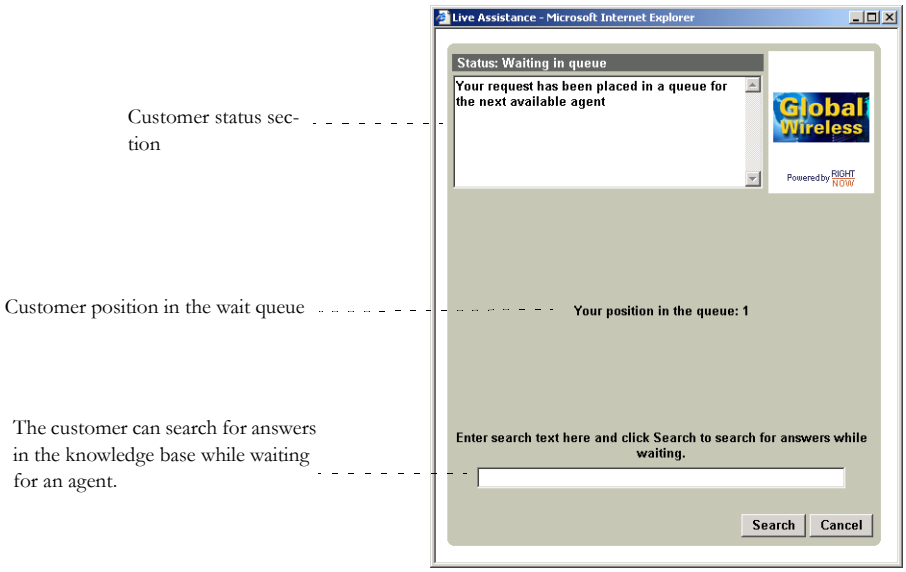

Customer status section
Customer position in the wait queue
The customer can search for answers in the knowledge base while waiting for an agent.
Live Assistance - Microsoft Internet Explorer
Status: Waiting in queue
Your request has been placed in a queue for the next available agent
Global Wireless
Powered by RIGHT NOW
Your position in the queue: 1
Enter search text here and click Search to search for answers while waiting.
Search
Cancel

Figure 94: Thin Client Searching for Agent

3 An agent accepts the chat request and begins chatting with the customer.

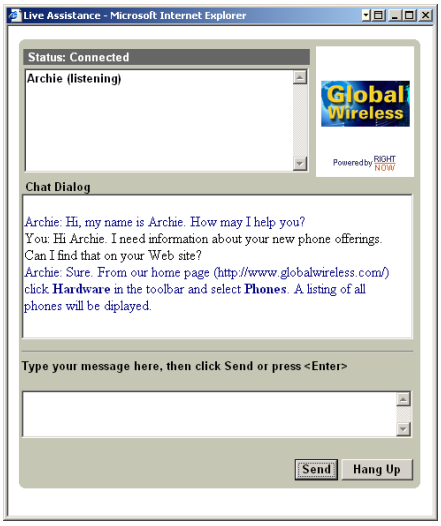

Live Assistance - Microsoft Internet Explorer
Status: Connected
Archie (listening)
Global Wireless
Powered by RIGHT NOW
Chat Dialog
Archie: Hi, my name is Archie. How may I help you?
You: Hi Archie. I need information about your new phone offerings. Can I find that on your Web site?
Archie: Sure. From our home page (http://www.globalwireless.com/) click Hardware in the toolbar and select Phones. A listing of all phones will be diplayed.
Type your message here, then click Send or press <Enter>
Send
Hang Up

Figure 95: Customer Interface using the Thin Client

4 The agent pushes a URL to the customer, which opens in a new frame inside the *same* web browser.


Live Assistance - Microsoft Internet Explorer
Status: Connected
Archie (listening)
Global Wireless
Chat Dialog
Archie: Hi, my name is Archie. How may I help you?
You: Hi. Can you tell me where to find information about your different plans?
Archie: You can find a lot of information in this answer. I'll open it in a window for you
***** URL Received: http://global.qa.lan/cgi-bin/global.cfg/php/enduser/cls_adp.php?p_faqid=3&p_created=1085667791
Type your message here
Send
Hang Up
Global Wireless
HOME | SERVICES | INTERNATIONAL | SPECIAL OFFERS | REPAIR | CONTACT
Support Home
Answers
Ask a Question
My Stuff
Login
Help
Search
Browse
Search Tips
Search Text (optional):
Search
Answer ID
3
Products
Wireless service
Executive
Nationwide
Family plan
Budget plan
Prepaid
Category
Service Plans
Date Created
05/27/2004 07:23 AM
Last Updated
06/01/2004 07:36 AM
What phone service plans do you offer and what is included in each plan?
Question
Where can I view all your phone service plans?
Answer
For a complete explanation of each of the following service plans, click on the corresponding link:
The Executive Plan is for high-volume business users who need nationwide and international access. See plan details at http://www.worldmobile.com/plans/executive/.
The Nationwide Plan is perfect for the frequent traveler within the United States. A variety of roaming-minute plans are available so you can select the plan that best meets your needs. For details, see http://www.worldmobile.com/plans/nationwide/.
Close this frame

Figure 96: Thin Client with Pushed URL Opening in Same Browser

5 The customer receives marked-up text using HTML, allowing you to display a linked image to the customer. You also have the ability to emphasize text with bold typeface.

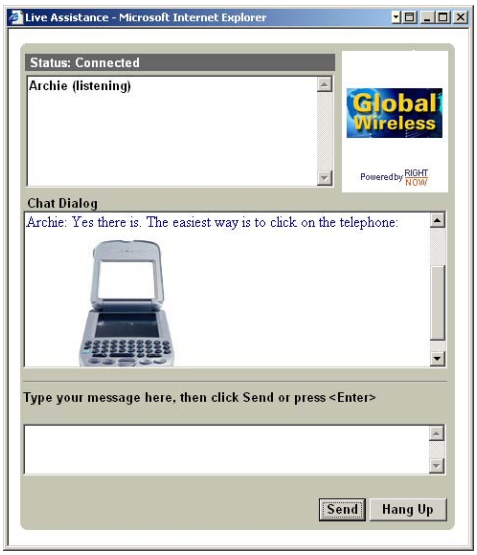

Live Assistance - Microsoft Internet Explorer
Status: Connected
Archie (listening)
Global Wireless
Powered by RIGHT NOW
Chat Dialog
Archie: Yes there is. The easiest way is to click on the telephone:
Type your message here, then click Send or press <Enter>
Send
Hang Up

Figure 97: Linked Image Displayed on the Thin Client

Chatting with a customer

By default, when you open the agent applet, you are available for one chat session. Also by default, customers will use the Java client to submit chat requests. If your RightNow administrator has enabled the thin client, the customer experience will be slightly different. From your perspective (using the agent applet), nothing will change regardless of the client being used by the customer.

If you are the agent selected for a chat request, you will receive an audible tone and the top section on the left side of the agent applet will display a chat request invitation. In addition, a toast invitation will open alerting you of the chat request. The chat request (both on the agent applet and toast) includes the customer's first and last names, email address, any incident or contact custom fields that have been configured by your RightNow administrator, the customer's operating system and web browser, and buttons to accept or decline the chat request. You can click either invitation to accept the chat request.

Path: Chat Home

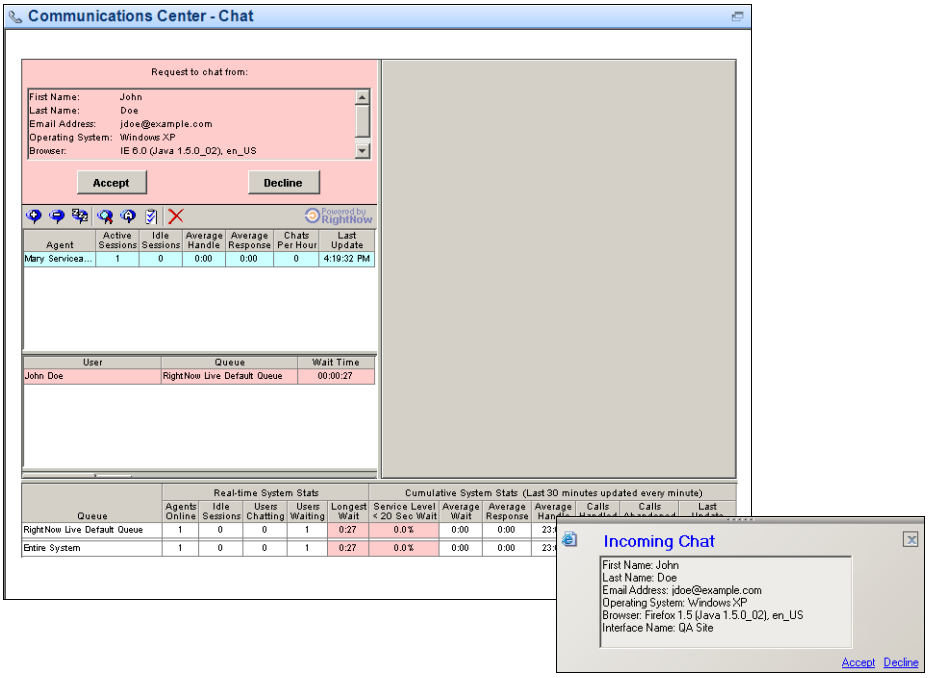


Figure 98: Incoming Chat Request and Toast

To chat with a customer:

1 Click the Accept button on the agent applet to accept the request and activate the chat section.

Or

Click Accept on the toast window to accept the request and activate the chat section.

Note If you click the Decline button on the agent applet or Decline on the toast, the chat request will be placed in the wait queue and routed to the next available agent.

When you accept a chat request, an automatic greeting is sent to the customer. The chat section of the agent applet displays the customer information and the message sent to the customer when you accepted the chat request. Also displayed on the chat section is the SmartSense emotive rating, providing you with immediate feedback on the general emotional state of the customer. The SmartSense meter is updated throughout the chat session based on the words being typed.

Important After the customer responds, the message displays on the chat dialog box, and the customer tab at the top of the chat section changes from gray to green, notifying you that it is your turn to respond.

Path: Chat Home>Accept

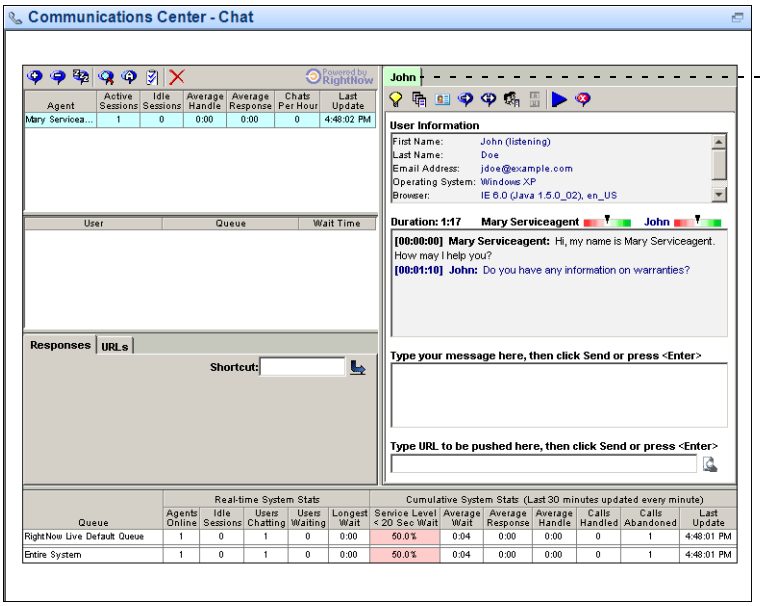

Communications Center - Chat
John
Customer tab changes to green, which signifies that it is your turn to respond.
User Information
First Name: John (listening)
Last Name: Doe
Email Address: jdoe@example.com
Operating System: Windows XP
Browser: IE 6.0 (Java 1.5.0_02), en_US
Duration: 1:17 Mary Serviceagent John
[00:00:00] Mary Serviceagent: Hi, my name is Mary Serviceagent. How may I help you?
[00:01:10] John: Do you have any information on warranties?
Type your message here, then click Send or press <Enter>
Type URL to be pushed here, then click Send or press <Enter>
Responses
URLs
Shortcut:

Figure 99: Chat Section after Customer Sends a Message

Note By default, a tab will change from green to yellow when a customer has been waiting for a response for 30 seconds. When the tab changes to red, it signifies that a customer has been waiting for a response for 60 seconds. Tab color timing can be configured by your RightNow administrator.

Important Additional tabs will appear at the top of the chat section if you are conducting multiple chat sessions at the same time. To manage the individual chat sessions, simply click a tab when the color changes from gray to green and send a response.

2 Type your reply in the message text box.

- As you type, a real-time spell checker recognizes misspelled words and marks them with a red zigzag underline. Right-clicking the misspelled word presents a list of substitute words from which you can choose.
- Using the right-click menu, you can also cut, paste, bold, and delete any text you type.
- To start a new paragraph in the message text box, press **Ctrl+Enter**.

3 Click the Send button or press **Enter** to send your response. The customer's tab color will change back to gray, which signifies that it is the customer's turn to respond to you.

For information on creating incidents from chat sessions, refer to "Creating incidents from chat sessions" on page 212.

Receiving a telephone callback request

Customers who want to speak to an agent on the telephone instead of using real-time chat can request a telephone callback on the Live Assistance page. When a customer submits a callback request, the request is treated like a chat and routed to the first available agent.

When you receive a callback request, a prompt will display in the upper left portion of the agent applet and will include the customer's first name, last name, email address, telephone number, operating system, and the web browser they are using. A toast will also display at the same time. You can accept the callback request from either the agent applet or the toast.

Path: Chat Home

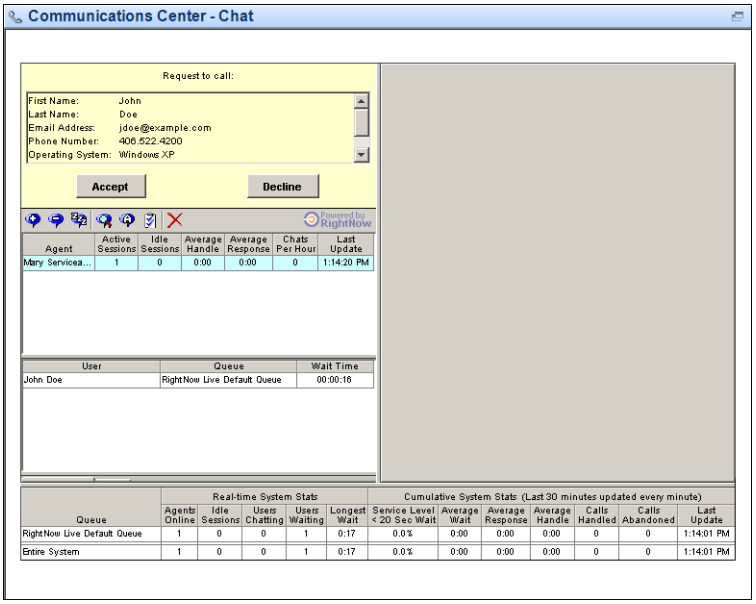


Figure 100: Customer Request for a Callback

To accept a telephone callback request:

1 Click the Accept button to accept the callback request.

The chat section on the agent applet displays the customer's information, including the phone number they provided.

Note The customer is notified that you will be calling them shortly. The customer is also notified that if they are connected to the Internet using the callback phone line, they should disconnect. If they are not connected to the Internet using the callback phone line, they are instructed to keep their client window open to maintain a connection to you.

Path: Chat Home>Accept

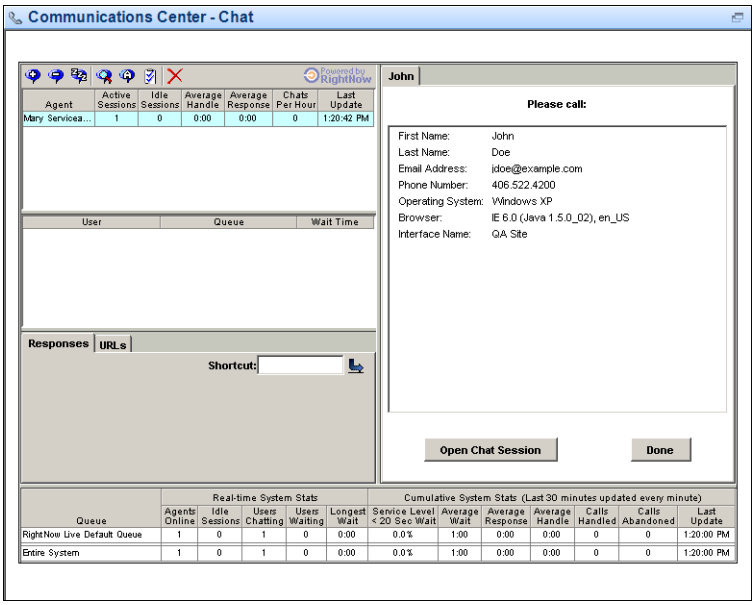


Figure 101: Callback Request with Open Chat Session Option

2 After speaking with the customer on the telephone, click the Done button to close the chat section.

Or

Click the Open Chat Session button to open a chat session with the customer (this assumes the customer has not disconnected from the Internet to free up their phone line). We recommend speaking with a customer on the telephone and asking for their permission before engaging in a chat with them. For information on chatting, refer to "Chatting with a customer" on page 190.

The next section discusses chat management tools that you can use while chatting with customers.

Using agent chat tools

The previous instructions contain the basic steps that take place between you and the customer during a chat session; however, RightNow Live has a variety of tools to help you answer questions and solve problems. This section contains a description of these tools and the procedures for using them.

Chatting with another agent

You can also request a chat session with another agent to assist you in solving customers' issues. This option allows you to have an internal chat with another agent without having to initiate a transfer or conference. In addition, an incident can be created from an agent-to-agent chat session. For information, refer to "Creating incidents from chat sessions" on page 212.

To chat with another agent:

1 Click the Agent-to-Agent Chat button to view the list of available RightNow Live agents.

Note At least one other agent must have an agent applet open in order for you to chat with them.

2 Select the agent you want to chat with. A chat dialog will open for the requested agent. You can chat with the agent just as you would with a customer.

Path: Chat Home>Agent-to-Agent Chat>Click Agent Name

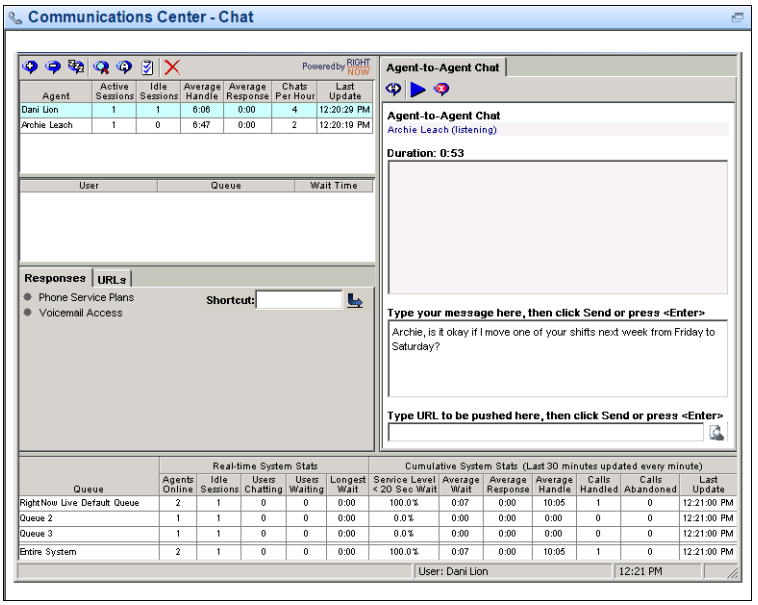

Communications Center - Chat
Powered by RIGHT NOW
Agent
Active Sessions
Idle Sessions
Average Handle
Average Response
Chats Per Hour
Last Update
Dani Lion 1 1 6:06 0:00 4 12:20:29 PM
Archie Leach 1 0 6:47 0:00 2 12:20:19 PM
User
Queue
Wait Time
Responses
URLs
Phone Service Plans
Voicemail Access
Shortcut:
Agent-to-Agent Chat
Agent-to-Agent Chat
Archie Leach (listening)
Duration: 0:53
Type your message here, then click Send or press <Enter>
Archie, is it okay if I move one of your shifts next week from Friday to Saturday?
Type URL to be pushed here, then click Send or press <Enter>
Real-time System Stats
Cumulative System Stats (Last 30 minutes updated every minute)
Queue
Agents Online
Idle Sessions
Users Chatting
Users Waiting
Longest Wait
Service Level < 20 Sec Wait
Average Wait
Average Response
Average Handle
Calls Handled
Calls Abandoned
Last Update
RightNow Live Default Queue 2 1 0 0 0:00 100.0% 0:07 0:00 10:05 1 0 12:21:00 PM
Queue 2 1 1 0 0 0:00 0.0% 0:00 0:00 0:00 0 0 12:21:00 PM
Queue 3 1 1 0 0 0:00 0.0% 0:00 0:00 0:00 0 0 12:21:00 PM
Entire System 2 1 0 0 0:00 100.0% 0:07 0:00 10:05 1 0 12:21:00 PM
User: Dani Lion
12:21 PM

Figure 102: Agent-to-Agent Chat

3 Click the Disconnect button when you are finished chatting with the agent.

Inserting standard responses and URLs

Frequently used responses and URLs can be prepared in advance so that you can quickly insert them in your message text box or URL text box and send them to a customer. Standard URLs are also known as "pushed" URLs because when you send one to a customer, a browser opens on their computer displaying the URL you sent them. These tools not only help you assist customers more quickly, but they also help you eliminate errors. If standard responses and URLs have been defined and designated for RightNow Live, they will appear on the Responses and URLs tabs on the left side of the agent applet.

Your RightNow administrator can also define shortcut IDs for standard responses and URLs. Then, you can type an ID in the Shortcut field and press **Enter** to automatically insert the response or URL in the appropriate text box.

Note To find a shortcut ID code, mouse over a standard text or URL entry.

To insert a standard response:

1 Click the Responses tab on the agent applet.

> **Note** If your organization uses folders to manage standard responses, the folders will be collapsed by default. Expand a folder to open it and view the responses.

Path: Chat Home>Responses

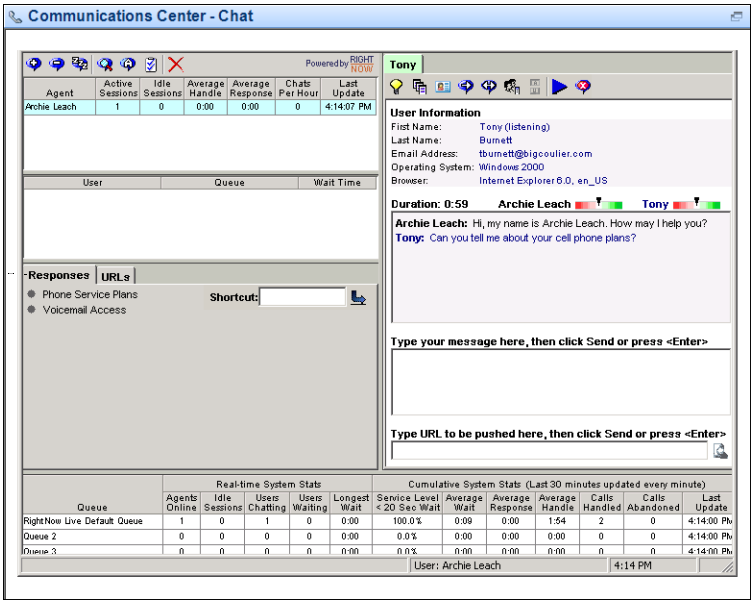


Figure 103: Responses Tab

2 Double-click a response to insert it in your message box. You can edit the text or send it as is.

Or

Type a shortcut ID in the Shortcut field and click the arrow or press **Enter**.

◇ **Tip** Mouse over a response to view the shortcut ID code.

Path: Chat Home>Responses>Double-Click Response

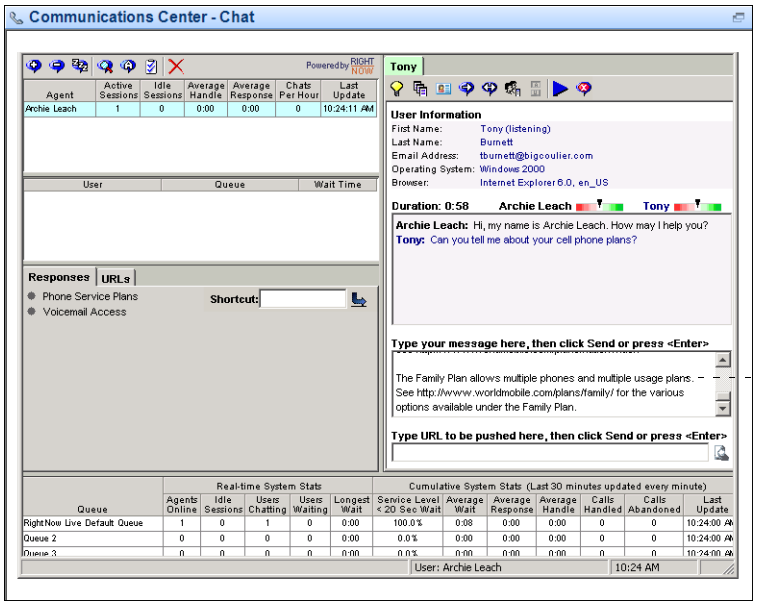


Figure 104: Inserting a Standard Response

3 Click the Send button or press **Enter** to send your standard response to the customer.

The next section describes how to push a standard URL to a customer.

To push a standard URL:

1 Click the URLs tab on the agent applet.

> **Note** If your organization uses folders to manage standard URLs, the folders will be collapsed by default. You must click a folder to open it and view the URLs.

Path: Chat Home>URLs

URLs tab

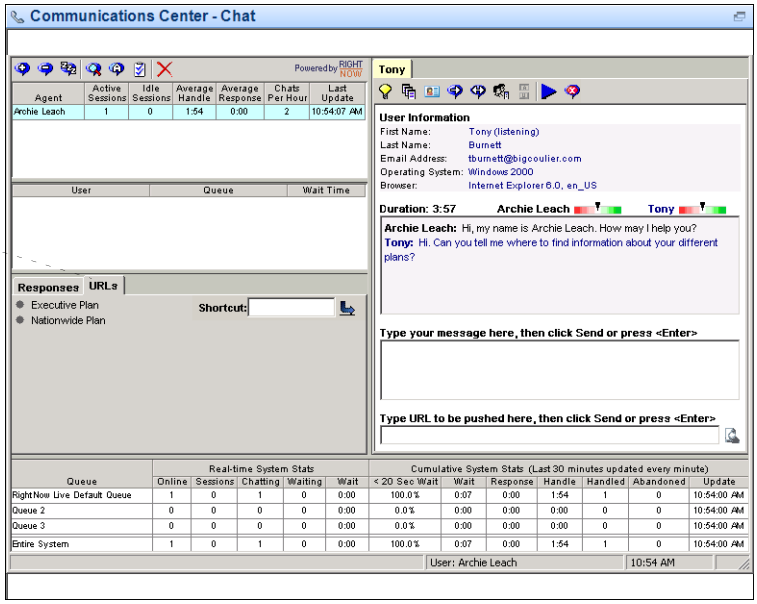


Figure 105: URLs Tab

2 Double-click the URL you want to push to the customer's screen. You can edit the URL or send it as is.

Or

Type a shortcut ID in the Shortcut field and click the arrow or press **Enter**.

◇ **Tip** Mouse over a URL to view the shortcut ID code.

Path: Chat Home>URLs>Double-Click URL

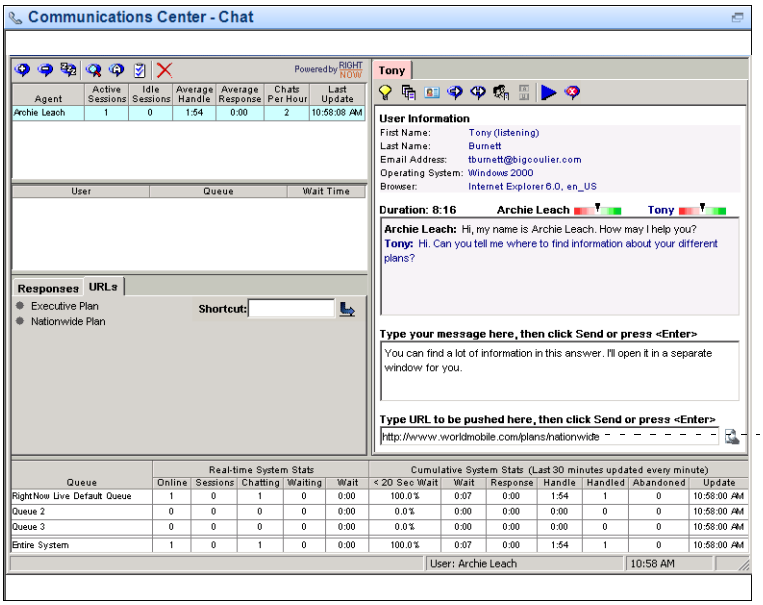


Figure 106: Inserting a Standard URL

3 To preview the URL before sending it to the customer, click the Preview button to the right of the URL.

4 Click the Send button or press **Enter** to send the URL to the customer.

Accessing SmartAssistant suggested answers

While chatting with a customer, you can use SmartAssistant to suggest answers for a customer's question. SmartAssistant searches the knowledge base and returns possible answers related to the chat history text (a new web browser opens containing links to the suggested answers). If any answer is pertinent, you can push the URL to the customer's screen, which opens a page containing the answer details.

To access SmartAssistant suggested answers:

1 Click the SmartAssistant button to open the Suggested Solution window. Customers cannot see the list of suggested answers.

Path: Chat Home>SmartAssistant

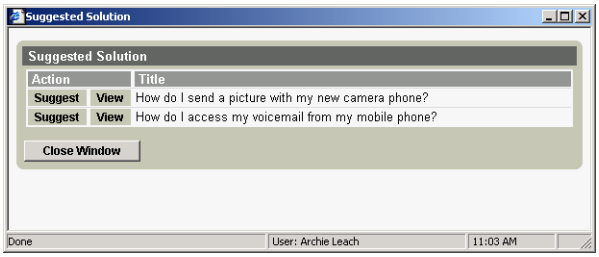


Figure 107: Suggested Solution Window

2 Click the View button next to the answer you want to view. This will open the Answer page in another web browser.

3 Click the Suggest button next to the answer you want to push to the customer. This will append the URL to the chat session.

4 Click the Close Window button to exit the Suggested Solution window.

Viewing customer session information

You can tailor your assistance to customers if you know what actions they performed before submitting their chat request. Using session tracking information, you can view all the pages they visited within the support site and search histories (text searches, general searches, and answers viewed). You will be better prepared if you know how much time customers have spent looking for answers before you assist them in a chat.

To view customer session information:

1 Click the Pages Viewed button to open the Session History window.

Path: Chat Home>Pages Viewed

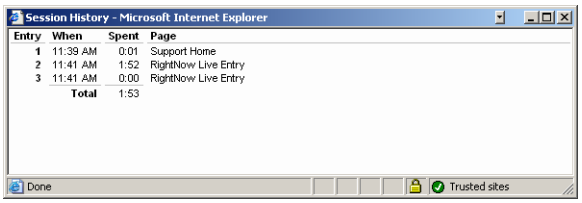

Session History - Microsoft Internet Explorer
Entry When Spent Page
1 11:39 AM 0:01 Support Home
2 11:41 AM 1:52 RightNow Live Entry
3 11:41 AM 0:00 RightNow Live Entry
Total 1:53
Done
Trusted sites

Figure 108: Session History Window

2 After reviewing the customer's session history, close the window to return to the chat.

Accessing customer history

While chatting with a customer, you might want to know more about the other interactions the customer has had with your organization. Using the Contact Search feature, you can find this type of information.

To access customer history:

1 Click the Contact Search button to open Contact Search. For information on searching for contacts, refer to the *RightNow 8.2 User Manual*.

Note While performing an agent-to-agent chat, contact search is not available.

Path: Chat Home>Contact Search

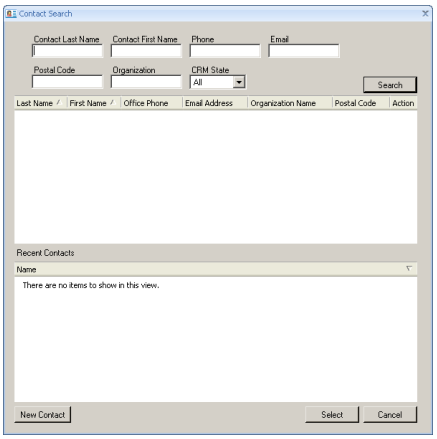


Figure 109: Contact Search

2 Fill in one or more fields and click the Search button.

3 When you are finished searching and want to return to the chat session, click the Communications Center–Chat content pane tab.

Or

Right-click the Contact Search content pane tab and select Close.

Transferring a chat to another agent

When necessary, you can transfer a chat to another agent. This feature is helpful when another agent has more experience with a specific topic than you do.

To transfer a chat to another agent:

1 At any point during your chat session, click the Transfer button to view a list of agents available for a transfer.

Path: Chat Home>Transfer

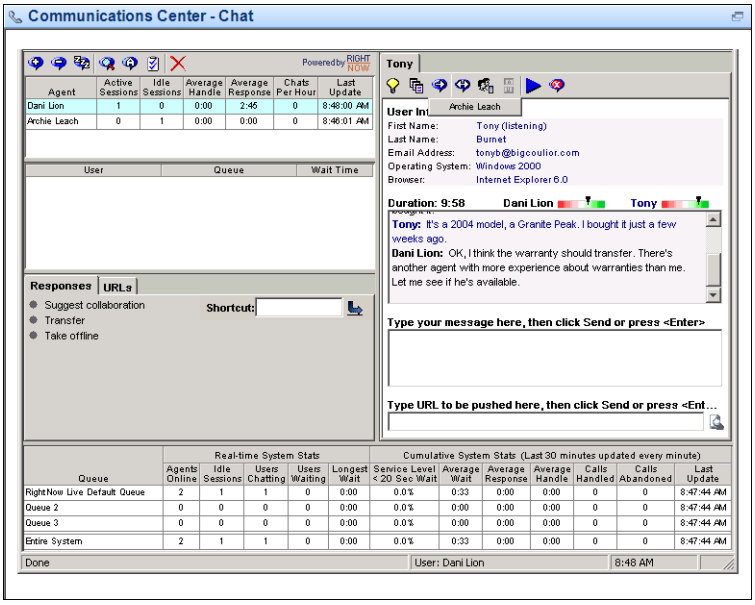


Figure 110: Transferring a Chat to Another Agent

2 When you see the agent you want to transfer the customer to, click the agent's name to open an internal chat.

Path: Chat Home>Transfer>Click Agent Name

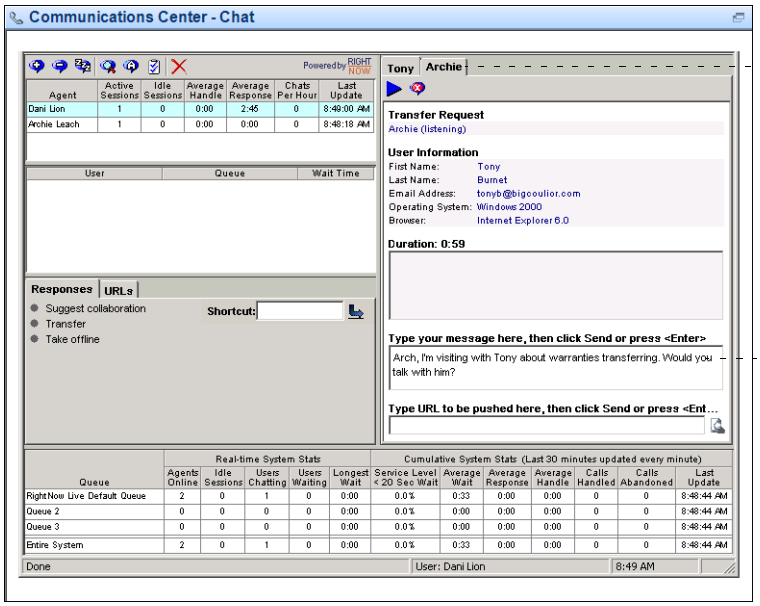

Communications Center - Chat
Tabs list the customer name and the selected agent you are requesting to take the transfer.
You send a message to the selected agent asking to transfer the customer.

Figure 111: Internal Chat Between Agents

3 The selected agent clicks the Transfer Accept button to accept the transfer, or they can decline the transfer.

Path: Chat Home>Transfer>Click Agent Name>Internal Chat>Transfer Accept

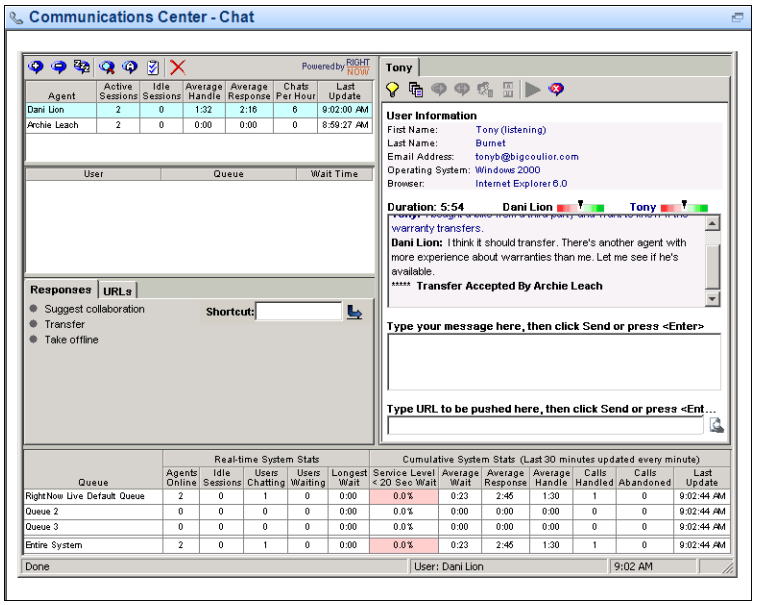


Figure 112: Agent Accepts Transfer

◇ **Tip** Once the transfer is made, the customer receives a message about the transfer.

Conferencing another agent into your chat

Agent conferencing is another way RightNow Service helps you provide superior service to your customers. Conferencing can be useful when you want to include another agent in your chat session to help you solve a customer's problem.

To conference another agent into your chat:

1 At any time during a chat session, click the Conference button to display a list of available agents.

2 Click the agent's name to open an internal chat.

Path: Chat Home>Conference

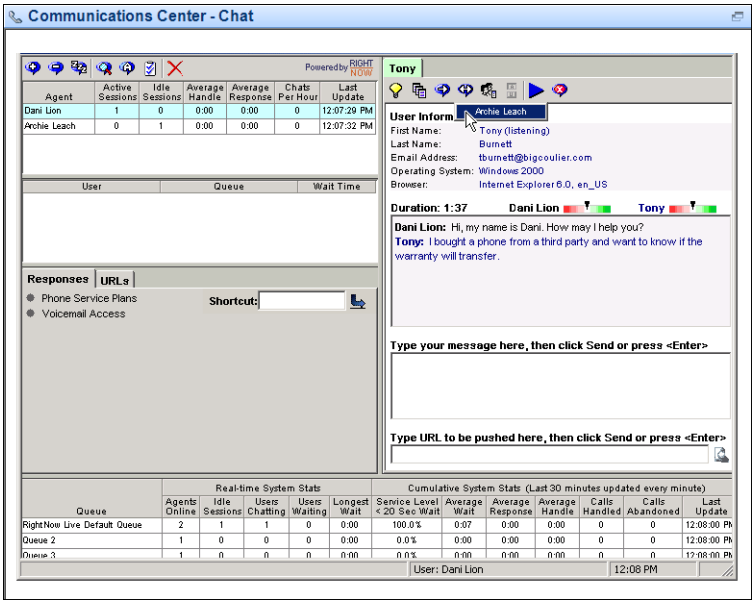


Figure 113: Conferencing Another Agent into Your Chat Session

3 Once you send the message to the selected agent, the agent clicks the Conference button to conference into the chat. They can decline the conference request.

Path: Chat Home>Conference>Click Agent's Name

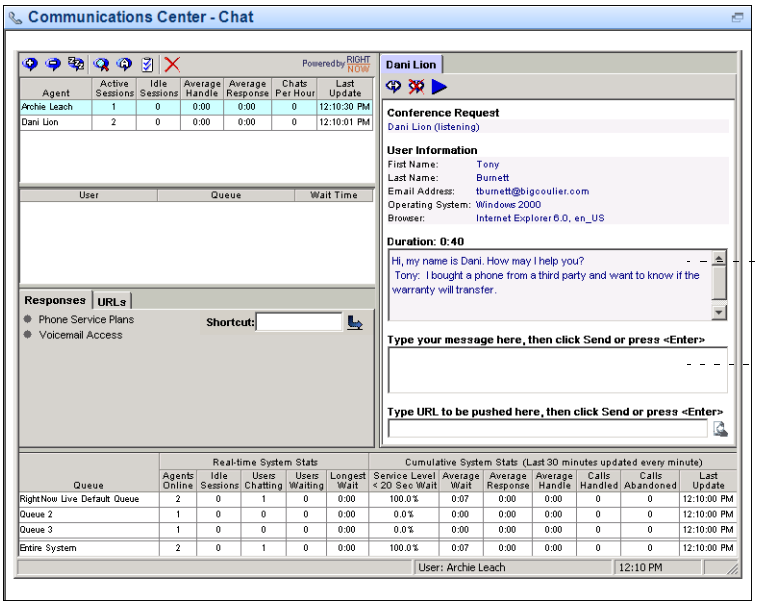

Communications Center - Chat
Powered by RIGHT NOW
Agent | Active Sessions | Idle Sessions | Average Handle | Average Response | Chats Per Hour | Last Update
Archie Leach | 1 | 0 | 0:00 | 0:00 | 0 | 12:10:30 PM
Dani Lion | 2 | 0 | 0:00 | 0:00 | 0 | 12:10:01 PM
User | Queue | Wait Time
Responses | URLs
Phone Service Plans
Voicemail Access
Shortcut:
Dani Lion
Conference Request
Dani Lion (listening)
User Information
First Name: Tony
Last Name: Burnett
Email Address: tburnett@bigcoulier.com
Operating System: Windows 2000
Browser: Internet Explorer 6.0, en_US
Duration: 0:40
Hi, my name is Dani. How may I help you?
Tony: I bought a phone from a third party and want to know if the warranty will transfer.
Type your message here, then click Send or press <Enter>
Type URL to be pushed here, then click Send or press <Enter>
Real-time System Stats
Cumulative System Stats (Last 30 minutes updated every minute)
Queue | Agents Online | Idle Sessions | Users Chatting | Users Waiting | Longest Wait | Service Level < 20 Sec Wait | Average Wait | Average Response | Average Handle | Calls Handled | Calls Abandoned | Last Update
RightNow Live Default Queue | 2 | 0 | 1 | 0 | 0:00 | 100.0% | 0:07 | 0:00 | 0:00 | 0 | 0 | 12:10:00 PM
Queue 2 | 1 | 0 | 0 | 0 | 0:00 | 0.0% | 0:00 | 0:00 | 0:00 | 0 | 0 | 12:10:00 PM
Queue 3 | 1 | 0 | 0 | 0 | 0:00 | 0.0% | 0:00 | 0:00 | 0:00 | 0 | 0 | 12:10:00 PM
Entire System | 2 | 0 | 1 | 0 | 0:00 | 100.0% | 0:07 | 0:00 | 0:00 | 0 | 0 | 12:10:00 PM
User: Archie Leach
12:10 PM
History of the dialog, if any.
The conferenced agent can send you a message here.

Figure 114: Conferenced Agent's Chat Section

Path: Chat Home>Conference>Agent's Name>Accept Conference

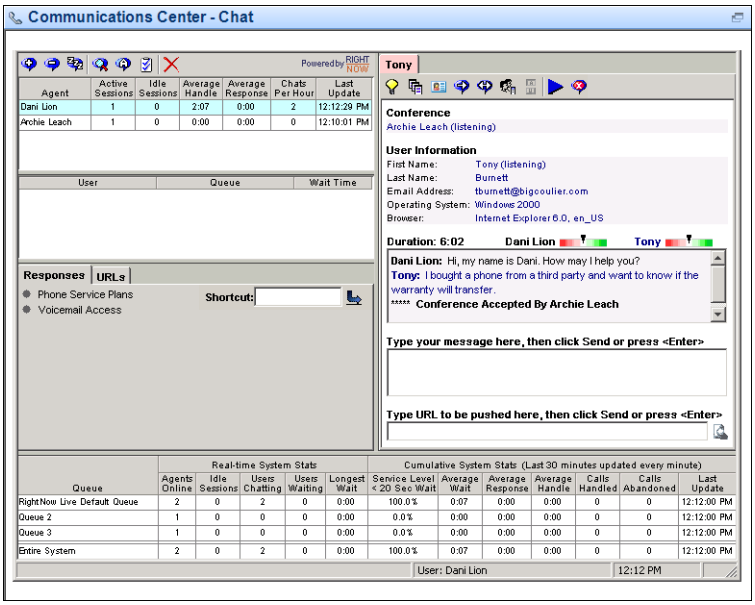

Communications Center - Chat
Powered by RIGHT NOW
Agent
Active Sessions
Idle Sessions
Average Handle
Average Response
Chats Per Hour
Last Update
Dani Lion 1 0 2:07 0:00 2 12:12:29 PM
Archie Leach 1 0 0:00 0:00 0 12:10:01 PM
User
Queue
Wait Time
Responses
URLs
Phone Service Plans
Voicemail Access
Shortcut:
Tony
Conference
Archie Leach (listening)
User Information
First Name: Tony (listening)
Last Name: Burnett
Email Address: tburnett@bigcoulier.com
Operating System: Windows 2000
Browser: Internet Explorer 6.0, en_US
Duration: 6:02
Dani Lion
Tony
Dani Lion: Hi, my name is Dani. How may I help you?
Tony: I bought a phone from a third party and want to know if the warranty will transfer.
***** Conference Accepted By Archie Leach
Type your message here, then click Send or press <Enter>
Type URL to be pushed here, then click Send or press <Enter>
Real-time System Stats
Cumulative System Stats (Last 30 minutes updated every minute)
Queue
Agents Online
Idle Sessions
Users Chatting
Users Waiting
Longest Wait
Service Level < 20 Sec Wait
Average Wait
Average Response
Average Handle
Calls Handled
Calls Abandoned
Last Update
RightNow Live Default Queue 2 0 2 0 0:00 100.0% 0:07 0:00 0:00 0 0 12:12:00 PM
Queue 2 1 0 0 0 0:00 0.0% 0:00 0:00 0:00 0 0 12:12:00 PM
Queue 3 1 0 0 0 0:00 0.0% 0:00 0:00 0:00 0 0 12:12:00 PM
Entire System 2 0 2 0 0:00 100.0% 0:07 0:00 0:00 0 0 12:12:00 PM
User: Dani Lion
12:12 PM

Figure 115: Initiating Agent Notified of Accepted Conference

Tip The initiating agent and customer are notified that the conference has started. Each person can send text and all those in the conference can see the message text and the name of the person who sent it.

Collaborating with a customer

RightNow's Collaboration feature allows you to guide a customer through a web page using your mouse pointer to demonstrate actions. In effect, you take control of the customer's web browser to "show" rather than "tell."

Note Your RightNow administrator must enable collaboration before you can collaborate with a customer.

Collaboration is not a desktop-sharing application; rather, it is a web browser sharing application. You can engage in only one collaboration session at a time.

Important When using collaboration, customers will automatically download and use the Java client instead of the thin client.

Collaboration will help eliminate the confusion that can arise when giving instructions to customers through dialog or text. Collaboration is effective for assisting customers in filling out forms or completing a sale. As a security measure, you should collaborate only on sites within your respective domains.

To collaborate with a customer:

1 In the URL text box, enter the collaboration URL.

A configuration setting controls the default URL that is pushed to the customer when you do not specify a URL before initiating a collaboration session. In addition, URLs can be selected from the URLs tab on the agent applet, providing a fast way to send URLs to customers to start collaborating. See "To push a standard URL:" on page 199.

2 Click the Collaborate button to initiate a collaboration session. Once initiated, the web site specified in the URL text box will open on your computer and the customer's.

Path: Chat Home>Collaborate



Figure 116: Collaboration Initiated on Customer's and Agent's Computers

The collaboration pointer appears on your web page and the customer's. (The pointer is the RightNow Live icon.) As you move your mouse, the pointer on the customer's screen mimics what you do on your screen; for example, you can select and show objects on the customer's web page. Any text you enter will be displayed on the customer's web browser window.

◇ **Tip** Because the customer cannot initiate collaboration, you are in control of the pointer on the customer's browser by default. However, you can pass pointer control to the customer at any time during the session.

Once you initiate a collaboration session, the collaboration control button is activated. This button contains the letters ***A*** and ***U***, allowing you to toggle control of the collaboration site between you (***A***) and the customer (***U***). When you have control of the collaboration site, the default letter ***A*** is prominent; when the customer has control of the collaboration site, the letter ***U*** is prominent. The collaboration control button prevents web browser crashes that can occur when both agent and customer are trying to control the collaboration site at the same time.

Path: Chat Home>Collaboration Control

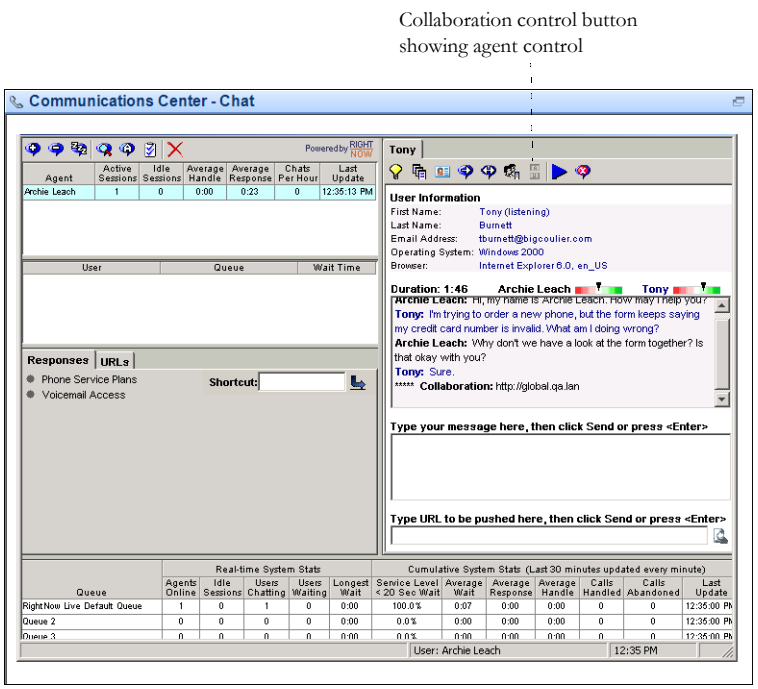

Collaboration control button showing agent control
Communications Center - Chat
Tony
User Information
Responses
URLs
Shortcut:
Type your message here, then click Send or press <Enter>
Type URL to be pushed here, then click Send or press <Enter>

Figure 117: Collaboration Control Button Activated

3 To allow the customer to control the collaboration site when you have control, click the bottom portion of the collaboration control button marked **U**. After clicking the collaboration control button marked **U,** any mouse movement by the customer will move the pointer within your web browser window.

4 To take control of the collaboration site when the customer has control, click the top portion of the collaboration control button marked **A**.

5 To end the collaboration session, close the web browser. You will return to the chat.

Path: Chat Home>Collaboration Control>Close

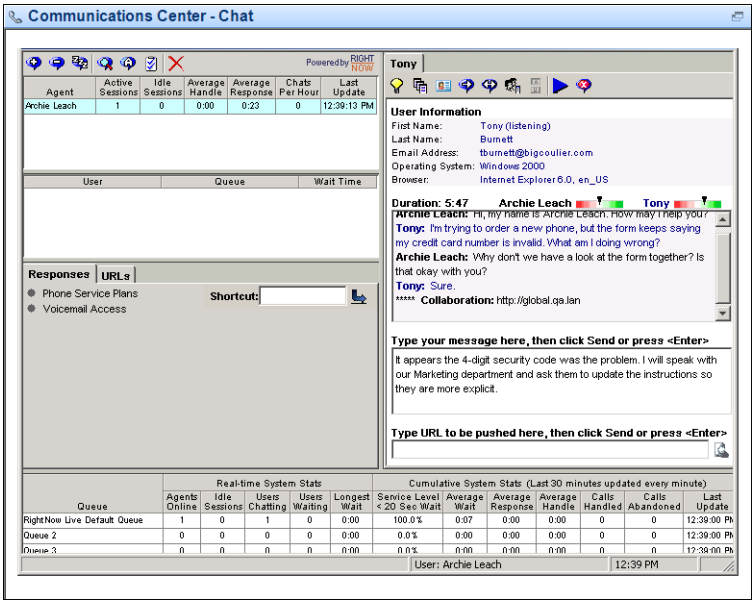


Figure 118: Chat Section after Collaboration Session

The URL that was pushed when you initiated collaboration will be listed in your chat dialog box and the customer's.

Creating incidents from chat sessions

By default, when you disconnect from a chat session, you are prompted to save the chat as an incident for tracking and reporting purposes. If you choose to create an incident, it will be assigned to you with a status and status type set by your RightNow administrator. The dialog from the chat session will be inserted as a response thread. For more information, refer to Chapter 2, "Incidents," on page 15.

To create an incident from a chat session:

1 Click the Disconnect button to disconnect from the chat session. A create incident prompt displays.

Path: Chat Home>Disconnect

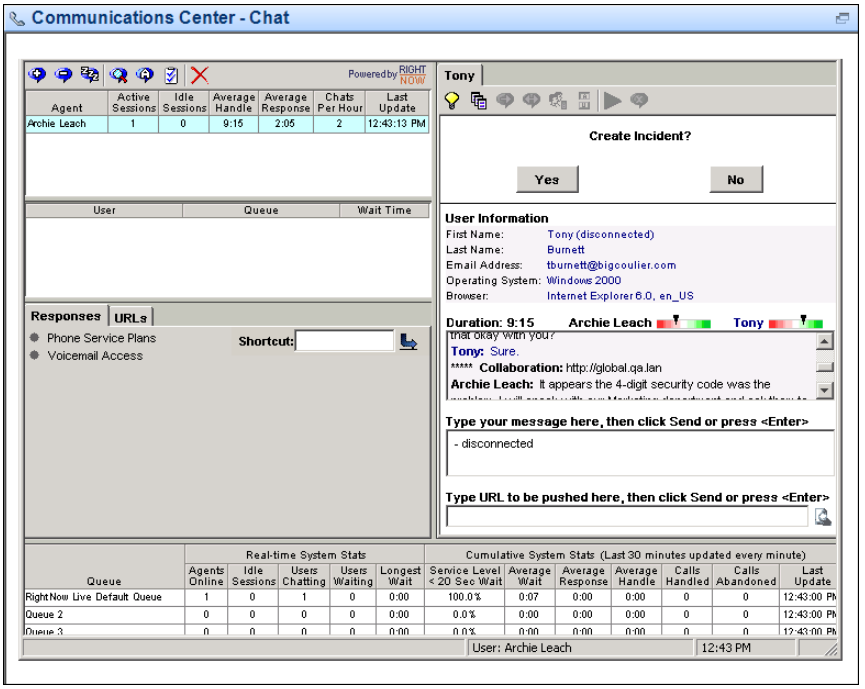


Figure 119: Create Incident Prompt

2 Click the Yes button and the new incident opens on the content pane.

Path: Chat Home>Disconnect>Create Incident?>Yes

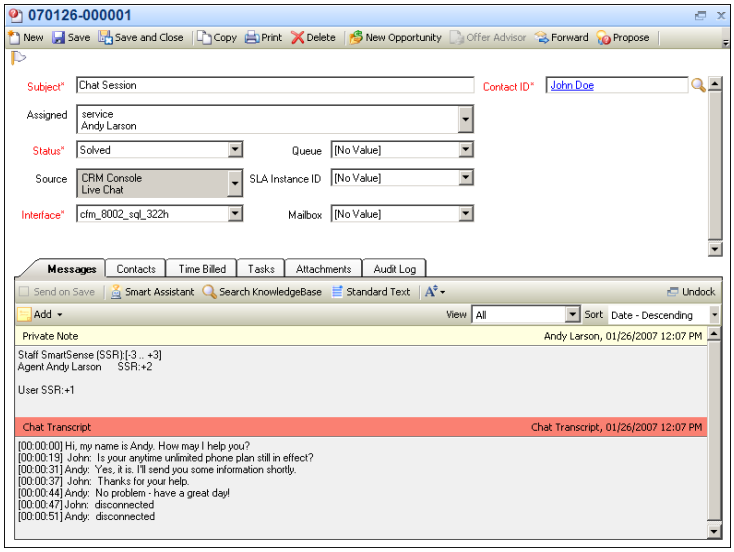


Figure 120: Incident Created from a Chat Session

The Subject field populates with "Chat Session," and the complete chat transcript is inserted as a response thread. The party that ended the chat session first (customer or agent) is also identified in the response thread.

You can edit this incident in the same manner as any other incident, including changing the incident subject. Refer to "Working with incidents" on page 26 for the options available when editing an incident.

Note If the chat session included an internal chat, such as during a transfer or conference request, the text of the internal chat is inserted as a note thread in the incident.

Also, if the customer used the thin client, HTML is not stored in the incident for security purposes.

3 Click the Save and Close button to save the chat session as an incident.

5

End-User Interface

The end-user interface consists of all the pages in RightNow Service that your customers can access. Each page contains unique features and options that can help customers find answers to their questions. As an agent, you can assist customers more effectively when you have become familiar with the functionality of your organization's end-user interface.

In this chapter

- **Accessing the end-user interface**—Contains the procedure for accessing the end-user interface. Also included is an overview of some of the configuration options. Refer to page 216.
- **Support Home page**—Contains a description of the Support Home page, the entry into the end-user interface. Also included is a description of the tabs that appear once customers click a link on the Support Home page and the procedure to activate accessible links. Refer to page 220.
- **Security and login**—Describes the functions customers can access when they have a customer account. Also included is a description of the Support Login page and how customers create a customer account. Refer to page 223.
- **Find Answers**—Describes the Find Answers page and all features associated with this component of the end-user interface. Refer to page 228.
- **Searching the knowledge base**—Describes the search techniques in RightNow Service, including which options are configurable and how each search technique and feature works. Refer to page 241.
- **Ask a Question**—Describes the Ask a Question component, including information about who can submit questions and the process that occurs when questions are submitted. Refer to page 257.
- **My Stuff**—Describes the My Stuff component, where customers with an account can view the questions they have submitted, update their profile information, define search preferences for the Find Answers page, view their current service contracts, and change their password. Refer to page 262.
- **Provide Feedback**—Describes how customers can submit feedback about your web site or overall customer service and support. Refer to page 275.
- **Help**—Describes the Support Help page. Refer to page 276.
- **RightNow Wireless**—Contains an overview of how customers can use a wireless application protocol device to access the end-user interface. Refer to page 277.

Accessing the end-user interface

You can access the end-user interface by typing the URL in the address bar of your web browser, or you can select it from the menu on the administration interface.

To access the end-user interface through a URL:

Launch your web browser and type the following URL.

```
http://<your_interface>.custhelp.com/cgi-bin/<your_interface>/php/
enduser/home.php
```

Path: Support Site URL


Support Home Page - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Links
SnagIt
Global Wireless
Find Answers
We store all resolved problems in our solution database. Search by product, category, keywords, or phrases.
Ask a Question
Submit a question to our technical support staff who will reply to you by email.
Live Assistance
Chat with a support technician on-line or request that one call you back at a later time.
My Stuff
Login to check the status of your questions, modify your answer update notifications, update your personal profile, or access restricted information and features.
Provide Feedback
Submit a suggestion, complaint, or other feedback about this site here.
Powered by RIGHT NOW
Trusted sites

Figure 121: Customer Entry into RightNow Service

To access the end-user interface from the administration interface:

Click Go and select Links>Interfaces>your_interface>End-user. By default, this opens the Support Home page. (If your RightNow administrator disabled the Support Home page, one of the other end-user pages opens instead.)

Configuration options

The functionality on the end-user interface is completely customizable and can be configured to reflect your organization's customer service objectives. Your RightNow administrator can enable and disable features, add products and categories to group answers, and incorporate your organization's color scheme and graphics.

Although listing specific configuration settings is beyond the scope of this chapter, you will benefit from a general understanding of the options available to your organization.

Support Home

- Display announcements to your web site visitors
- Enable and disable the main components in RightNow Service
- Add a link for RightNow Live
- Require customers to enter a password to access the Support Home page

Find Answers

- Configure the Product and Category drop-down menus, the options in the Search By drop-down menu, the answer fields that are displayed, and how answers are sorted
- Disable the Search By drop-down menu and enable the Sort By drop-down menu
- Enable customers to search the knowledge base using Browse and Web Indexer
- Control how much information to provide customers when viewing an answer and specify what actions customers can take

Ask a Question

- Require customers to view an answer or perform a search before submitting a question
- Specify whether customers can submit file attachments with their questions
- Set up business rules to automatically supply a preliminary response to customers' questions before they are submitted
- Restrict access to the Ask a Question page to only those customers who have a customer account or to those who have an active SLA allowing this access
- Specify the number of questions that can be submitted by assigning customers an SLA

Live Assistance

- Enable RightNow Live so customers can request a chat, callback request, or both
- Route customers to another web site when Live agents are unavailable
- Enable customers to search the knowledge base while in the wait queue
- Define standard responses and URLs that agents can use when chatting with customers

My Stuff

- Allow customers to access and update the questions they have previously submitted
- Allow customers to subscribe to be notified when a particular answer is updated or when any answer in a specific product or category is updated
- Allow customers to change certain default settings on the Find Answers page when they are logged in and want to search the knowledge base
- Make contracts visible so customers can view their contracts with your organization.

Login

- Allow customer accounts to be created by customers or force customers to log in with an existing user ID/password combination
- Specify what information customers must supply when creating an account
- Allow customers to be associated with an organization when creating a customer account

Before you explore the options available to your customers, take a look at RightNow Service from your customers' perspective. Figure 122 shows the actions customers can perform from each of the main components as well as the path they follow navigating your organization's web site. Depending on how your site is configured, your customers may not have all of the options shown.

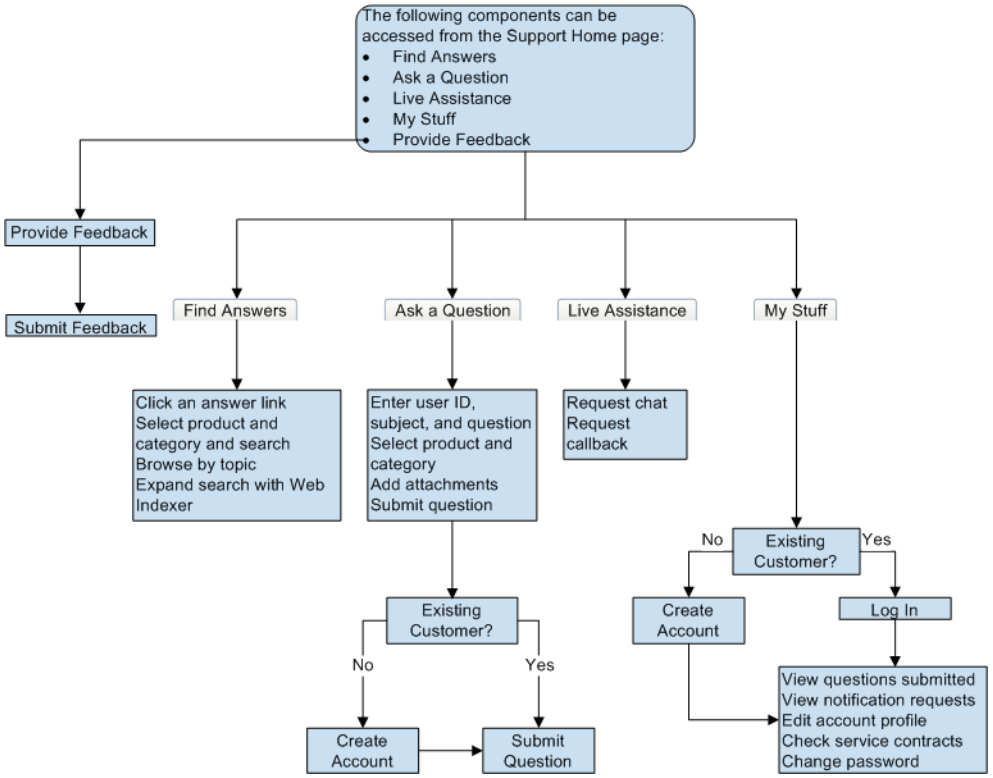


Figure 122: Customer Options on the End-User Interface

Support Home page

The Support Home page contains links to the main components in RightNow Service. This page provides customers with quick access to the tools they need to answer their questions and receive immediate customer service.

Note Depending on how your site is configured, the end-user interface may look and function differently than what is shown and explained in this chapter.

By default, the Support Home page contains links to Find Answers, Ask a Question, My Stuff, and Provide Feedback. (Your RightNow administrator must enable RightNow Live for the Live Assistance link to appear, as shown in Figure 123.) If your administrator disables the Support Home page, the next available page opens; this is usually the Find Answers page.

Path: Support Site URL


Support Home Page - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Links
SnagIt
Global Wireless
Find Answers
We store all resolved problems in our solution database. Search by product, category, keywords, or phrases.
Ask a Question
Submit a question to our technical support staff who will reply to you by email.
Live Assistance
Chat with a support technician on-line or request that one call you back at a later time.
My Stuff
Login to check the status of your questions, modify your answer update notifications, update your personal profile, or access restricted information and features.
Provide Feedback
Submit a suggestion, complaint, or other feedback about this site here.
Powered by RIGHT NOW
Trusted sites

Figure 123: Support Home Page with RightNow Live Enabled

When a customer clicks one of the links, the appropriate page opens. Clicking the Find Answers link, for example, opens the Find Answers page.

Path: Support Home>Find Answers


Find Answers (Page 1 of 2) - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Global Wireless
Support Home
Answers
Ask a Question
Live Help
My Stuff
Login
Help
Search
Browse
Search by Product
All
Search by Category
All
Search by Keyword
Search Tips
Search
Search By
Phrases
Powered by RIGHT NOW
15 Answers Available
Page: 1 of 2 Go
Answer ID
Summary
1 How do I change my address?
3 Do you have service area maps?
7 Are there any shortcuts for listening to voice messages?
11 Am I charged airtime when I check my voicemail from my wireless phone?
13 What is a dropped call?
2 What is roaming?
4 How do I place a call when my phone is roaming?
5 How do I set up my voicemail?
6 How do I access my voicemail?
8 Which phones have text messaging?
Trusted sites

Figure 124: Find Answers Page

Most of the pages accessed from the Support Home page contain tabs that link to the other main components. The tabs make it easy for the customer to navigate the interface.

Path: Support Home>Find Answers



Figure 125: End-User Interface Tabs

Tabs for logging in and accessing help are also available. Clicking the Login tab takes customers to the Support Login page where they can log in to access restricted functions. (Restricted functions and the RightNow Service login feature are described on page 223.) Clicking the Help tab displays general information about the end-user interface.

◇ **Tip** The Provide Feedback link appears on the Support Home page only. Refer to "Provide Feedback" on page 275 for information.

Accessible Links function

The end-user interface contains the Accessible Links function in compliance with Section 508 of the Rehabilitation Act. It can be activated using accessibility software, such as a screen reader, or through keystrokes. (The administration interface in RightNow Service also contains an accessibility interface available through the thin client. Refer to "Logging in to the accessibility interface" on page 304.)

This section contains the procedure to activate the accessible links so you can follow along with those customers who are using a software reader. Customers who have a screen reader will be prompted to show accessible links.

To activate the accessible links:

1 From a page other than Support Home, press **Tab** until the focus is on the My Stuff tab.

2 Press **Tab** again and then press **Enter**.

Path: Find Answers>Tab to My Stuff>Tab>Enter

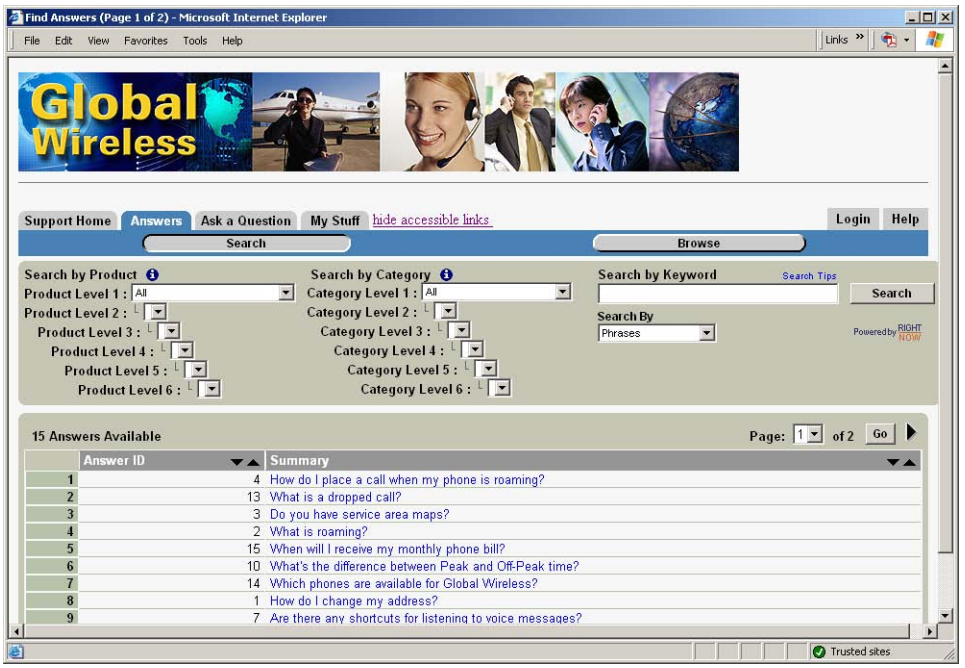

Find Answers (Page 1 of 2) - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Links
Global Wireless
Support Home
Answers
Ask a Question
My Stuff
hide accessible links
Login
Help
Search
Browse
Search by Product
Product Level 1 : All
Product Level 2 :
Product Level 3 :
Product Level 4 :
Product Level 5 :
Product Level 6 :
Search by Category
Category Level 1 : All
Category Level 2 :
Category Level 3 :
Category Level 4 :
Category Level 5 :
Category Level 6 :
Search by Keyword
Search Tips
Search
Search By
Phrases
Powered by RIGHT NOW
15 Answers Available
Page: 1 of 2 Go
Answer ID
Summary
1 4 How do I place a call when my phone is roaming?
2 13 What is a dropped call?
3 3 Do you have service area maps?
4 2 What is roaming?
5 15 When will I receive my monthly phone bill?
6 10 What's the difference between Peak and Off-Peak time?
7 14 Which phones are available for Global Wireless?
8 1 How do I change my address?
9 7 Are there any shortcuts for listening to voice messages?
Trusted sites

Figure 126: Find Answers Page with Accessible Links Activated

◇ **Tip** Click Hide Accessible Links next to the My Stuff tab to deactivate this function.

Security and login

Customers can quickly access the knowledge base to find the information they need, and some customers will never do more than search for and view answers. Other customers, however, may require more personalized service. For those customers, RightNow Service allows access to restricted functions once they have a valid customer account (that is, once they have a contact record in the knowledge base).

Note By default, RightNow Service allows customers to create a customer account, but this functionality can be restricted to only RightNow staff members.

In addition to providing personalized service to your customers, the login feature enables your organization to control and track who accesses your web site and maintain an up-to-date knowledge base. Once customers have a valid customer account, they can log in and take any of the following actions.

- Submit questions
- Track the questions they have submitted and make updates
- Access their profile information to update
- View privileged access answers if they have an SLA with custom answer access levels

This section describes the Support Login page and how customers can create a customer account.

Accessing restricted functions

When customers request access to restricted functions (for example, when they click My Stuff on the Support Home page), the Support Login page opens.

Path: Support Home>My Stuff

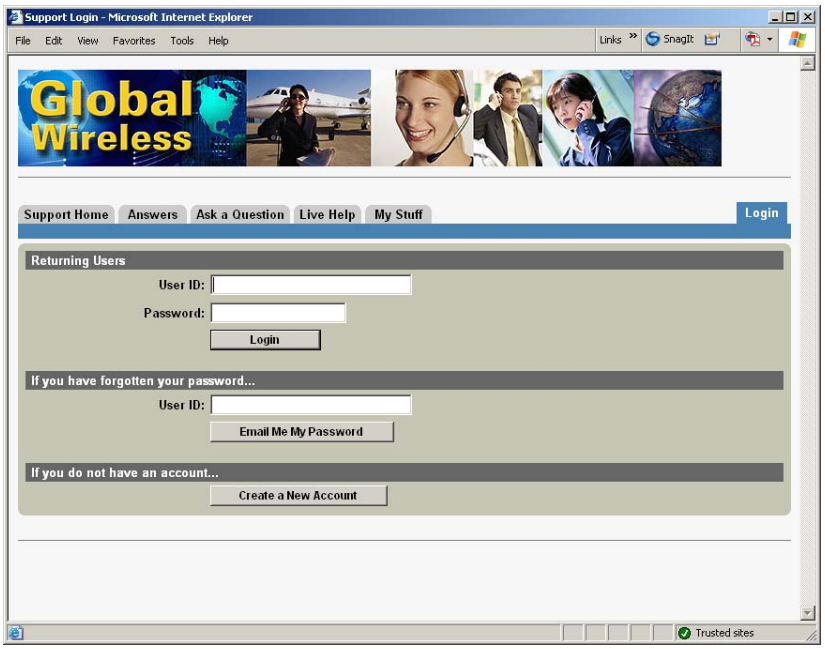


Figure 127: Support Login Page

The default settings for this page allow customers to enter their account information, have their password emailed to them if they have forgotten it, or create an account if they do not have one.

- **Returning users**—Returning customers type their user ID and password (if required) to access the restricted functions. User ID and password are stored in the customer's contact record.
- **If you have forgotten your password**—Returning customers who do not remember their password can enter their user ID and click the Email Me My Password button to have their password emailed to them.
- **If you do not have an account**—Customers who do not have a customer account can create one to access restricted functions.

Note If your RightNow administrator has disabled this option so that customers cannot create an account, this section does not appear.

Creating an account

Customers click the Create a New Account button to open the Create a New Account page.

Path: My Stuff>Create a New Account

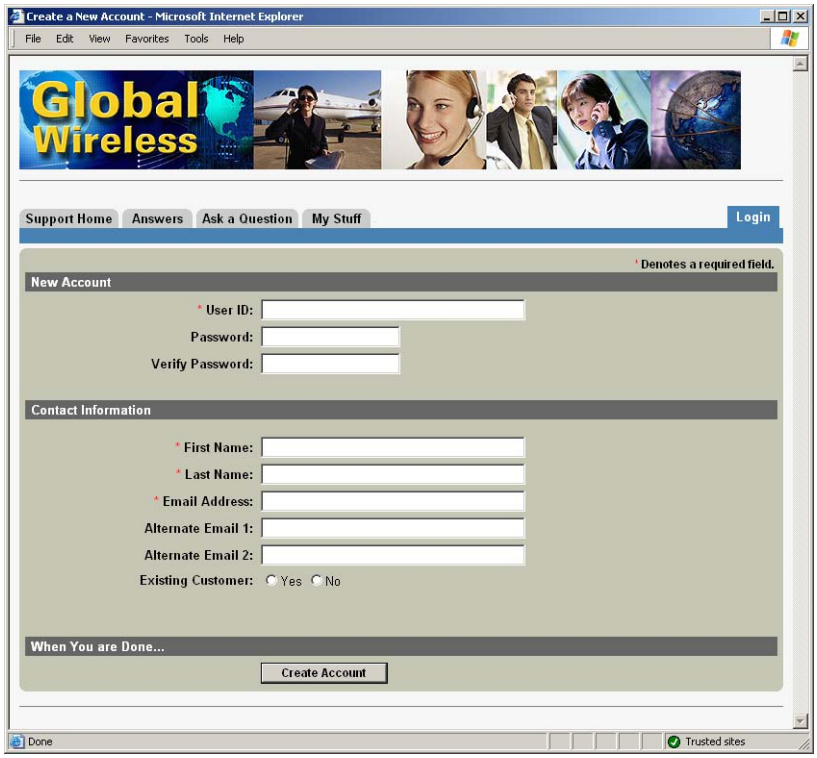


Figure 128: Create a New Account Page

In the default configuration, the Create a New Account page prompts the customer for a user ID and password (if required in your application), email address (including alternate addresses), and first and last names. Any contact custom fields that have end-user visibility are also displayed, such as the Existing Customer field in Figure 128.

Associating contacts with an organization

Your RightNow administrator can configure your site to allow contacts (those customers with a customer account) to be associated with an existing organization. Associating contacts with an organization allows you to group contacts under an organization umbrella.

When an organization association is established, contacts can view the questions submitted by other contacts associated with the organization through My Stuff. In addition, if the organization has been assigned an SLA that contains access to privileged groups of answers, the contacts can view those answers as well. For the procedure to apply an SLA instance to an organization or a contact with no organization association, refer to "Understanding SLAs" on page 29.

Figure 129 shows the Create a New Account page with the Organization ID field. (This is the ID entered in the Login field of the organization record.) If a password has been defined for the organization, that field also appears and contacts must enter the organization's password. For information on the fields available when adding and editing an organization record, refer to the *RightNow 8.2 User Manual*.

Path: Support Login>Create a New Account

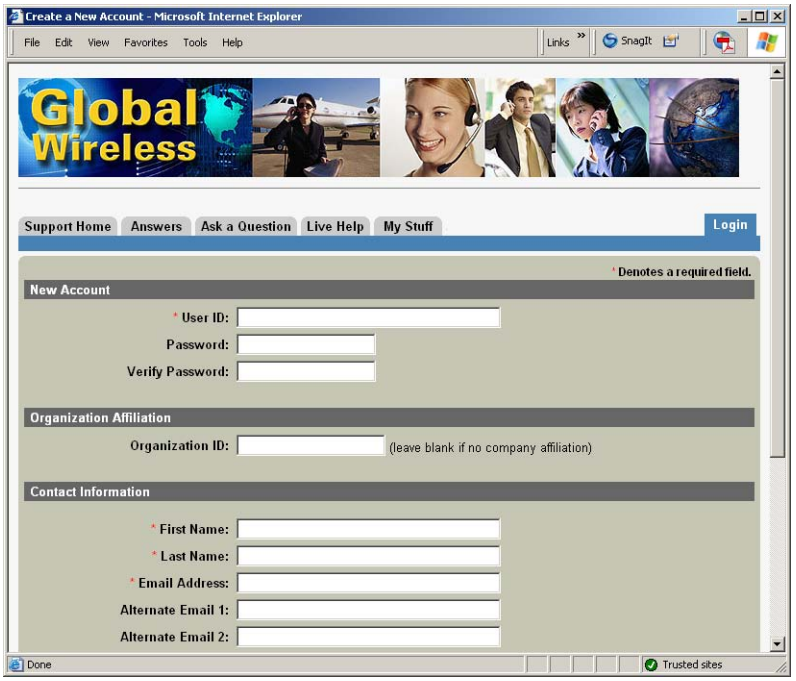


Figure 129: Organization Affiliation Option when Creating an Account

After customers log in

After customers log in, the page they initially tried to access opens. (For example, if the customer clicked My Stuff and logged in, the My Stuff page opens.) Customers need to log in only once per session; that is, after logging in to My Stuff, customers do not need to log in a second time to ask a question.

In addition, if customers have their web browser's cookie functionality turned on, they do not have to log in again when the session ID changes, such as when they close their web browser or access a different web site. Customers can click the Logout tab to securely log out of their current session.

Important If the cookie functionality is turned off, customers are required to log in whenever the session ID changes. Additionally, once a session has expired, bookmarks to any answers with status or answer access level changes are accessible to only those customers with the appropriate visibility privileges.

The remainder of this chapter describes the options available to all customers from the Support Home page, beginning with the Find Answers page.

Find Answers

As the first level of your customer support, the Find Answers component provides customers with immediate answers to their questions and can significantly reduce the number of incidents submitted to your support staff. When customers click the Find Answers link on the Support Home page or the Answers tab on another end-user page, a list of the most frequently viewed answers in your knowledge base is displayed.

Path: Support Home>Find Answers


Find Answers (Page 1 of 2) - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Global Wireless
Support Home
Answers
Ask a Question
Live Help
My Stuff
Login
Help
Search
Browse
Search by Product
All
Search by Category
All
Search by Keyword
Search Tips
Search
Search By
Phrases
Powered by RIGHT NOW
15 Answers Available
Page: 1 of 2 Go
Answer ID
Summary
1 How do I change my address?
3 Do you have service area maps?
7 Are there any shortcuts for listening to voice messages?
11 Am I charged airtime when I check my voicemail from my wireless phone?
13 What is a dropped call?
2 What is roaming?
4 How do I place a call when my phone is roaming?
5 How do I set up my voicemail?
6 How do I access my voicemail?
8 Which phones have text messaging?
Trusted sites

Figure 130: Find Answers Page

The example shown in Figure 130 is a common configuration where both products and categories have been added. Your RightNow administrator can configure the drop-down menus, options in the Search By drop-down menu, the columns that display the answers, and how the answers are sorted.

Additionally, answers are labeled as "New" and "Updated" to alert customers when a new answer has been published and when an existing answer has been updated. These features are also configurable.

Table 48 contains descriptions of the fields and buttons on the Find Answers page.

Table 48: Find Answers Page Description

Field/Button	Description
	Customers click this button to search the knowledge base for answers.
	Customers click this button to search using the multi-level view in Browse. **Note:** The multi-level Browse view is enabled by default. Refer to "Searching with Browse" on page 247.
Product	This drop-down menu contains all the products that have been added in your application. If your organization has more than one RightNow Service interface, only the products that have visibility on this interface are displayed. **Note:** Customers can click the View Product Hierarchy button on the right above the Product drop-down menu to display the product hierarchy in a separate window. Refer to "Viewing product and category hierarchy" on page 231.
Additional product levels	This drop-down menu contains all additional levels of products for the products contained in the Product drop-down menu.
Category	This drop-down menu contains all the categories that have been added in your application. If your organization has more than one RightNow Service interface, only the categories that have visibility on this interface are displayed. **Note:** Customers can click the View Category Hierarchy button on the right above the Category drop-down menu to display the category hierarchy in a separate window. Refer to "Viewing product and category hierarchy" on page 231.
Additional category levels	This drop-down menu contains all additional levels of categories for the categories contained in the Category drop-down menu.
Search by Keyword	Customers can enter the text they want to search for in this text box. It is not necessary to enter text in order to perform a search.
	This button activates all searches whether the customer is using the drop-down menus or text to search.

Table 48: Find Answers Page Description (Continued)

Field/Button	Description
Search Tips	Customers can click this link for information about options in the Search By drop-down menu and suggestions for conducting effective searches.
Search By	This drop-down menu determines the search criteria to be used in the search. Each option uses a different search technique. For information, refer to "Search techniques" on page 242. **Note:** Your RightNow administrator can change the options in the drop-down menu or prevent this drop-down menu from appearing.
Sort By	This drop-down menu determines how the answers are sorted. The default options are Default Sort and Subject (Summary field on the administration interface). For example, if the customer chooses Subject, the questions are displayed in alphabetical order by subject. The default sort is defined by your RightNow administrator in a search page report. **Note:** The options in the drop-down menu are determined by the fields that are displayed in the list of answers. Your RightNow administrator can change the display fields or prevent this drop-down menu from appearing.
◀▶	These arrows are used to move forward and back one page at a time.
Answer ID	This column displays the answer ID.
Summary	This column displays the answer summary.
▲	This arrow is used to sort the answers in ascending order.
▼	This arrow is used to sort the answers in descending order.

Viewing product and category hierarchy

If your site is configured with products and categories, and if products and categories have end-user visibility, customers can click the product or category icon on the Find Answers page to see the product or category hierarchy for your site. Customers can then click a product and RightNow Service returns the search results for the product on the Find Answers page.

◈ **Tip** Your site may also be configured for product-category linking and product-disposition linking. When products are linked to categories, only the linked categories are displayed when a customer selects a product on the end-user interface or when a staff member selects a product when working with an answer or incident. When products are linked to dispositions, only the linked dispositions are displayed when you select a product for an incident. Product linking is an optional feature designed to enhance efficiency for both staff members and customers. Refer to "Working with incidents" on page 26 for information.

Path: Support Home>Find Answers>View Product Hierarchy

Customers click a product and RightNow Service returns answer results for that product.



Figure 131: Product Hierarchy

Viewing answers

Once customers find a possible answer to their question, they can view the details by clicking the summary link on the Find Answers page.

Path: Support Home>Find Answers>Summary Link


Answer - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Global Wireless
Support Home
Answers
Ask a Question
My Stuff
Login
Help
Search
Browse
Documents
Search by Product
Search by Category
Search by Keyword
Search Tips
Search
Search By
Sort By
Phrases
Powered by RIGHT NOW
Answer ID
10
Products
Professional Services
Category
Information
Date Created
09/29/2005 01:16 PM
Last Updated
09/29/2005 01:45 PM
Access Level
Everyone
Print Answer
Email Answer
What's the difference between Peak and Off-Peak time?
Question
Answer
Peak time is during the daytime, from 7 am - 6 pm, Monday through Friday.
Off-Peak time is evening and weekend hours, from 6 pm - 7 am, Monday through Friday, and from 6 pm Friday evening until 7 am Monday morning.
Notify Me by Email if this Answer is Updated
How well did this answer your question?
100% 75% 50% 25% 0%
Submit Rating
Users who viewed this answer have also viewed
• Am I charged airtime when I check my voicemail from my wireless phone?
• What is roaming?
• What is airtime?
• Can you please send me information about calling plans?
• Are there any shortcuts for listening to voice messages?
Previously Viewed Answers
• Can you please send me information about calling plans?
• Which phones have text messaging?
• What is a dropped call?
• What is roaming?
• Am I charged airtime when I check my voicemail from my wireless phone?
Back to Search Results
Trusted sites

Figure 132: Answer Page

The Answer page displays the details of the answer. The amount of information displayed depends on how your site is configured. Links to any related answers are also displayed on the bottom of the page.

On this page, customers can:

- Subscribe to be notified whenever the answer is updated.
- Print the answer.
- Email the answer to themselves or someone else.
- Rate the usefulness of the answer and provide feedback about the answer.
- View a related answer.
- Search for another answer.

Table 49 describes the fields and buttons on the Answer page.

Table 49: Answer Page Description

Field/Button	Description
Answer ID	This field displays the answer ID.
Product	This field displays the product of the answer, if products have been added. **Note:** Customers can click the product link to perform a search by that product.
Category	This field displays the category of the answer, if categories have been added. **Note:** Customers can click the category link to perform a search by that category.
Date Created	This field displays the date and time the answer was created.
Last Updated	This field displays the date and time the answer was updated.
Access Level	This field displays the access level that has been assigned to the answer. In addition to the Everyone access level, privileged access levels can be assigned through SLAs and applied to organizations and contacts with no organization association. Then, when a customer is logged in, answers with privileged access levels are displayed on the Find Answers page.
Print Answer	Customers click Print Answer to open a new window that contains a basic text version of the answer. Refer to "Print an Answer" on page 235.
Email Answer	Customers click Email Answer to send the answer to an email address. Refer to "Email an Answer" on page 235.

Table 49: Answer Page Description (Continued)

Field/Button	Description
Question	This field displays the question.
Answer	This field displays the answer.
Notify Me by Email if this Answer is Updated	Customers click this button to subscribe to the answer. Any time the answer is updated, customers will be notified by email. Refer to "Notify Me by Email..." on page 234.
How well did this answer your question?	This option allows customers to rate the effectiveness of the answer. If they rate the answer below 100%, a feedback form opens where they can provide feedback on why the answer did not completely answer their question. Refer to "How Well Did This Answer Your Question?" on page 236.
Submit Rating	Customers click this button to submit their answer rating.
Users who viewed this answer have also viewed	This section contains a list of related answers links. Customers can click a link to view the details of a related answer. Refer to "Viewing related answers" on page 238.
Back to Search Results	Customers click this link to return to the Find Answers page. If a search was conducted, the Find Answers page contains the answers that met the search criteria; otherwise, the page contains the initial list of answers.

The following sections contain descriptions of the options available to customers when viewing an answer.

Notify Me by Email...

Customers can choose to be notified by email whenever an answer is updated. For example, some customers may want to be notified when the answer about a new product's release date is updated. They would then be notified if the release date changes.

Note Customers must have a valid customer account to subscribe to notifications.

Path: Support Home>Find Answers>Summary Link>Notify Me By Email If This Answer Is Updated

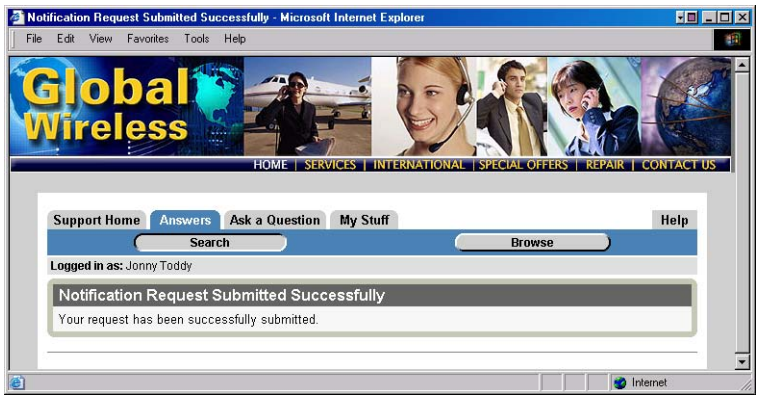


Figure 133: Notification Request Submitted Successfully Page

If customers have not yet logged in during the current session, the Support Login page opens when they click the Notify Me by Email if this Answer is Updated button. Once they log in or create an account, the notification request is submitted. (For a description of the Support Login page, refer to "Security and login" on page 223.)

◇ **Tip** Customers can also request notification of new and updated answers by product and category. Refer to "Profile" on page 268 to see how customers can request to be notified when any answer associated with a particular product, category, or both is updated.

Print an Answer

Customers who want a printout of a particular answer can print the basic text version of the answer and designate printer options. When a customer clicks the Print Answer button, a new window opens and displays a basic text version of the answer. A print window also opens, allowing the customer to choose printer options.

Email an Answer

Customers can also send an answer to an email address by clicking the Email Answer button. A new window opens and displays a form that prompts them for the email address to send to, the customer's first and last name, email address, and any comments they want to add. RightNow Service populates the Subject field with the subject of the answer (Summary field).

Note RightNow Service also populates name and email address fields for those customers who are logged in when they request this option.

Path: Support Home>Find Answers>Summary Link>Email Answer

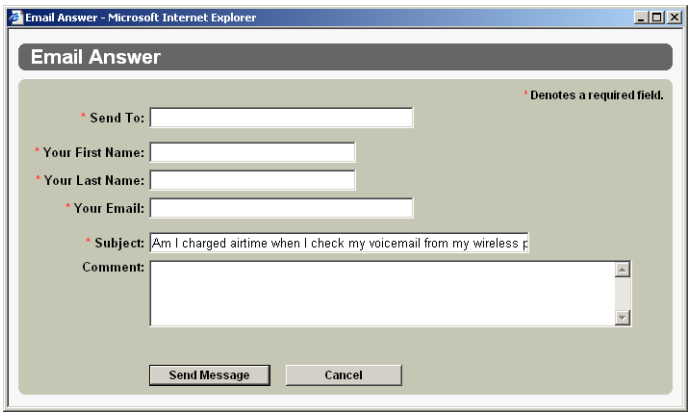


Figure 134: Email Answer Form

Important If a customer emails an answer that has a privileged access level, the recipient must log in to verify access level privileges before viewing the answer.

How Well Did This Answer Your Question?

To help you improve the quality and content of your public answers, RightNow Service allows your customers to rate the usefulness of answers in your knowledge base and suggest how answers could be improved. This feedback can then be used to improve the effectiveness of the self-service component of your customer service.

At the bottom of the Answer page, customers can select a percentage that reflects how well the answer addressed their issue. If customers respond with 100%, they return to the Find Answers page; if they respond with a rating less than 100% (or another configured level), a feedback form opens.

Note This feature can be enabled without the feedback form option; in this configuration, customers rate the effectiveness of an answer, but are not provided with the feedback form to add comments.

Path: Find Answers>Summary Link>Submit Rating Less Than 100%

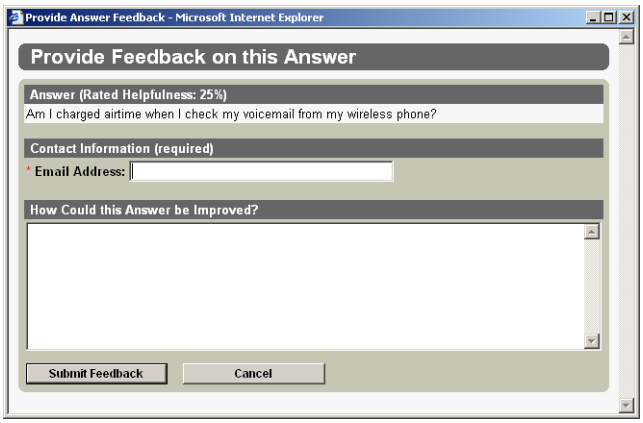

Provide Answer Feedback - Microsoft Internet Explorer
Provide Feedback on this Answer
Answer (Rated Helpfulness: 25%)
Am I charged airtime when I check my voicemail from my wireless phone?
Contact Information (required)
* Email Address:
How Could this Answer be Improved?
Submit Feedback
Cancel

Figure 135: Provide Answer Feedback Form

◇ **Tip** Customers are required to type their email address before the feedback can be submitted.

When the customer clicks the Submit Feedback button, an incident is created in RightNow Service. The email address is added as the incident contact and the suggestion is added to the incident thread. (Refer to "Working with incidents" on page 26.) Your RightNow administrator can specify the URL that will be used for the feedback form and can route the feedback incident using business rules.

When a customer submits a rating, the solved count of the answer is directly affected. The percentages, 0, 25, 50, 75, and 100 (these percentages are configurable), represent a 5-point scale that either raises or lowers the answer's solved count. A rating of 0% decreases an answer's solved count. The following section describes how solved count works.

Solved count and score

The Solved Count feature collects information about the usefulness of answers in your knowledge base and uses this data to rank your answers. Implicit data is compiled when customers select and view answers; explicit data is compiled when customers rate the effectiveness of individual answers. Using these solved count values, RightNow Service can dynamically rank the answers by their usefulness and present customers with the most effective answers first.

Note By default, the Solved Count feature is enabled. Your RightNow administrator can configure the rate and frequency by which the solved count of unused answers is reduced.

The answer's score value is a calculated value equal to the answer's solved count combined with any "fix at" positions specified in the answer's Display Position drop-down menu.

- **Implicit ratings**—Implicit ratings are gathered as customers view answers. If a customer views an answer, the solved count increases. If the customer continues to another answer, the solved count of the first answer is decreased, so answers viewed early in a session have the smallest solved count increase. The solved count is also increased when you or another agent use a SmartAssistant suggested answer when responding to a customer's question. For the procedure to ask SmartAssistant for suggestions when working on incidents, refer to "Adding SmartAssistant suggested answers" on page 39.
- **Explicit ratings**—Explicit ratings are gathered from the response to the question, "How well did this answer your question," which is displayed at the bottom of the Answer page. (See Figure 132 on page 232.) For information on this feature, refer to "How Well Did This Answer Your Question?" on page 236.

Over time, an unused answer's solved count gradually declines or ages. The solved count of unused answers also declines at a constant rate over time. Ultimately, if an answer has not been viewed for an extended period of time, an answer's solved count reaches zero.

Viewing related answers

The Related Answers feature is a subset of SmartAssistant that displays a list of answers that can assist customers in finding answers. This feature can also help reduce the number of questions submitted to your support staff.

By default, the Related Answers feature is enabled; however, before any related answers links appear on the bottom of the Answer page, your site must have enough relatedness information, which is generated through the general use of your site and through an auto-linking feature.

◇ **Tip** Related answers are displayed on the bottom of the Answer page under the Users Who Viewed This Answer Have Also Viewed section.

Path: Find Answers>Summary Link



Figure 136: Related Answers Links

Viewing previously viewed answers

The Answer page contains a list of all the answers viewed by the customer in the current session. The customer can click any answer previously viewed to return to the answer. The answer being viewed is not included in the list.

Path: Find Answers>Summary Link



Figure 137: Answer Page with Links to Previously Viewed Answers

Searching the knowledge base

RightNow has four search techniques for searching for answers: Phrases, Similar Phrases, Exact Search, and Complex Expression. Each search technique is an option in the Search By drop-down menu on the Find Answers page (Figure 124 on page 221). Customers can choose which search technique to use based on their specific requirements. The following section provides background information for effectively using each technique and some basic search functionality available in RightNow Service.

◈ **Tip** Your customers can access help about searching the knowledge base by clicking the Search Tips link on the Find Answers page.

Search basics

All search techniques search against a list of words and phrases that is indexed from each answer in RightNow Service. The list of indexed words and phrases is created from each answer by first extracting all the stopwords from the answer, then taking each individual word, each pair of words, and each triple of words. Stopwords are common words such as *a*, *an*, and *the*. Your RightNow administrator can also enclose words and phrases in HTML tags to prevent them from being indexed and searchable in answers.

Once each word or phrase is identified within the answer, a stemming algorithm is applied before storing it in the index. In RightNow Service, stemming is used for all supported languages. Finally, each word or phrase in the index is assigned a weight based on the number of occurrences of that word within the answer. Each occurrence is weighted for importance by its location: in the summary or heading, the description, the body of the answer, or the Keywords field (weighted heaviest).This can be configured by your RightNow administrator.

Word stemming

All the search techniques in RightNow Service use "stemmed" words. In most languages, every root word has a different form depending on the tense, such as singular or plural, or past, present, and future. Each word that is indexed or searched for in RightNow Service is stemmed, leaving just the root instead of the whole word. In this way, substantial space is saved while simultaneously making the search broader and more appropriate. For example, the words *reflection, reflections, reflected, reflecting,* and *reflects* all have *reflect* as the root word. All of these words are stored as *reflect* in the database. Storing the word in the stemmed form is obviously more efficient because it takes less storage space, and searching produces more accurate results.

Words are stemmed using the Porter algorithm. RightNow Service supports Danish, Dutch, English, Finnish, Norwegian, Russian, Swedish, Spanish, Italian, French, Greek, German, and Portuguese word stemming.

Logical operators

All search techniques in RightNow Service support logical operators. Logical operators are the symbols + (AND) and – (NOT) that can be used to explicitly find answers that contain a word (+) or that do not contain a word (–).

Search techniques

The Search By drop-down menu on the Find Answers page (Figure 124 on page 221) contains four options: Phrases, Similar Phrases, Exact Search, and Complex Expression. Customers can choose which search technique to use based on their specific requirements.

Phrases

In this search technique, the customer types a phrase or a question to search the knowledge base. The match is determined based on the similarity between the words or phrases. Word stemming and logical operators are supported in this search technique.

Similar phrases

In this search technique, a list of similar words is generated from the words or phrases entered. This new word list is generated from synonyms or similarly spelled words. Two steps are performed for searching in English, while only one step is used for the other supported languages. Word stemming and logical operators are supported in this search technique.

- **English**—Words and phrases entered are first checked for correct spelling. If the words are spelled correctly, a list of synonyms is generated for each word, and the search is performed using this synonym list. If a word is not spelled correctly, the spell checker generates ten suggested words for the incorrectly spelled word. Then, a list of synonyms for each suggested word is generated, and the search is performed using this list.
- **Other languages**—For languages other than English, the above approach for spelling correction is used, but no synonym expansion is performed.

Exact search

In this search technique, answers with the same pattern of words are matched and displayed to the customer. The pattern in the returned answers may be different from the search text in the sense that the returned answers will have the same sequence of stemmed words, but these stemmed words may be separated by one or more stopwords. Logical operators are supported in this search technique.

Complex expression

This search technique is the only technique that supports wildcard searching, which enables customers to search for words and phrases they are not familiar with. The wildcard is the asterisk (*) character, which translates to "anything may appear here." The wildcard character must be added to the end of a word or partial word. Customers can also use a tilde (~) character before a word to perform a similar phrases search on that word only. Word stemming and logical operators are also supported in this search technique.

Refer to "Using special characters when searching" on page 105 for a list of special characters that can be used when searching standard search fields in RightNow Service.

Search features

RightNow Service contains several features to help customers find answers more quickly. This section describes the features and includes examples of search results when these features have been configured by your RightNow administrator.

Search term highlighting

When customers search for a term on the Find Answers or Answer pages, all occurrences of that term in the answer summaries are highlighted in the search results and also in the answers. For example, if a customer searches for "roaming," that word is highlighted. (See Figure 138 on page 244.) Search terms are highlighted on both answer and document searches.

Path: Find Answers>Search Text “roaming”>Search



Figure 138: Highlighted Search Results

Search text feedback

When customers search for answers, their search text might include misspellings, stopwords, or words that are not found in any answers. After a search is completed, RightNow Service provides feedback about the search terms used. This feedback can help customers refine their search to return more appropriate results.

Figure 139 shows the feedback for the search phrase “charges outside of regional callin area.”

Path: Find Answers>Search Text “charges outside...callin area”>Search

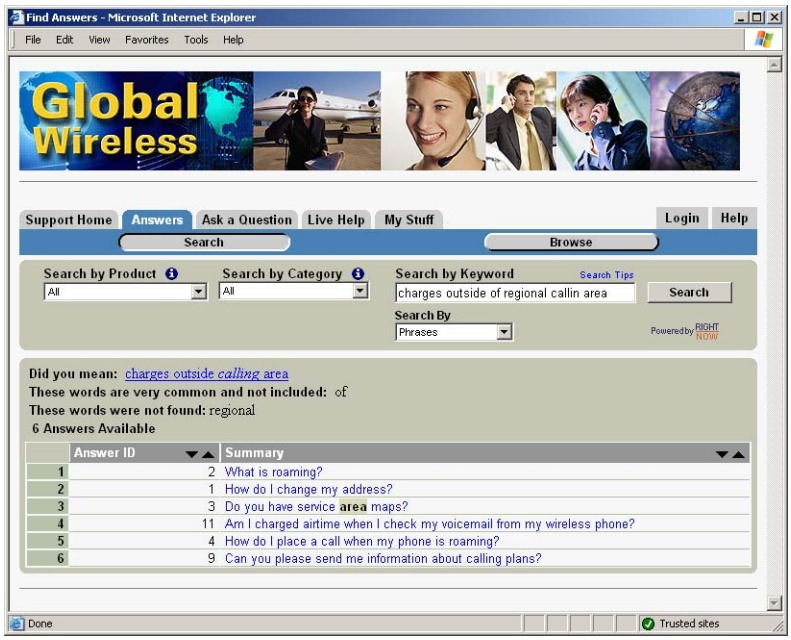


Figure 139: Search Text Feedback

In this example, the word “calling” is misspelled. The common word “of” is a stopword and is therefore not used for the search. As a result, the search text feedback suggests the search text “charges outside calling area.” The misspelled word in the suggested search text is set in italic type. Customers can click the suggestion to search using the suggested search text instead of having to type in the text field.

Note The Did You Mean section appears only when a possible misspelling is included.

Topic words

Your RightNow administrator can also configure your site for topic words, which associates a specific word or multi-word phrase with a particular answer or web-accessible document. This ensures that the answer or document is always returned during a search containing that word.

Answers and documents that are associated with a topic word are displayed in the Recommended Documents section on the Find Answers and Documents pages. And the topic words defined for your application can be displayed in different styles when customers view search results.

Your RightNow administrator can also specify that an answer or document is always prominently displayed, regardless of the search text. Figure 140 shows an answer associated with a topic word.

Path: Find Answers>Search Text "roaming">Search

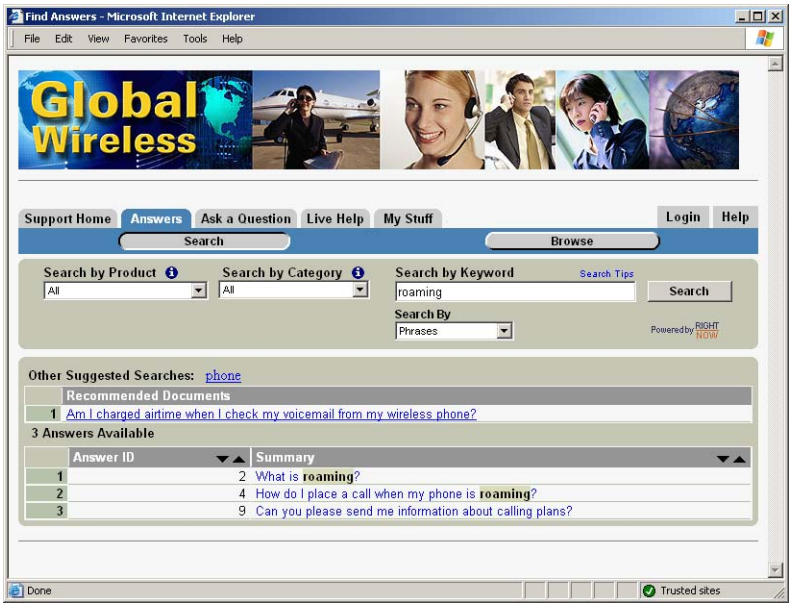


Figure 140: Displaying Answers Using Topic Words

Suggested searches

Suggested searches help customers search for answers by suggesting terms that they have not thought of or did not know the proper terminology for. Customers can click the links of suggested search terms to search using those terms without typing search text in the search text field. Figure 141 shows the suggested search terms displayed above the search results.

Path: Find Answers>Search



Figure 141: Suggested Search Results

Searching with Browse

In addition to the standard search method, your site may be configured so that customers can search using Browse. This search method provides a new view into your knowledge base and can be especially effective for those customers who do not know the exact terminology to conduct a standard search.

In Browse, answers are grouped based on keywords, products, additional levels of products, categories, additional levels of categories, and noun phrases in the Summary and Question fields. Grouping is done in the background by the utility *agedatabase;* when *agedatabase* runs, it regroups answers based on updates to your knowledge base. Your RightNow administrator can also choose to blend Browse with the SmartAssistant technology. In this way, answers are returned based on both content (SmartAssistant) and concepts (Browse).

Browse can be configured as a single- or multi-level view; the views differ in presentation only, not in content. Your RightNow administrator has determined the most effective option for your application. By default, the multi-level Browse is enabled.

Related Browse topics

RightNow Service can also be configured to display a list of Browse topics related to a customer's search text when conducting a standard search. The folder list is displayed below the list of answers.

Path: Find Answers>Search



Figure 142: Find Answers Search with Related Topics

Browse with the single-level view

The single-level view assists customers in finding answers by providing general topics they can choose from and then narrowing to a specific answer. This Browse option is designed for novice users who prefer to be guided through their search. Each page displays multiple topics depending on the size of your knowledge base, and customers can choose the topic that best describes their question.

Path: Find Answers>Browse


Find Answers - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Global Wireless
Support Home
Answers
Ask a Question
My Stuff
Login
Help
Search
Browse
Click on the following item which most closely matches your question...
Call, Global Wireless, Messaging Available, Charged Airtime, V200 Verden V300 (10)
Time, Customers Receive, Bill, Month, Weekend (2)
Return to top level
If you do not see an answer to your question, try searching our knowledge base.
Most Popular Answers
Am I charged airtime when I check my voicemail from my wireless phone?
What is roaming?
What is a dropped call?
Which phones have text messaging?
Can you please send me information about calling plans?
What's the difference between Peak and Off-Peak time?
How do I change my address?
Do you have service area maps?
What is airtime?
Are there any shortcuts for listening to voice messages?
Which phones are available for Global Wireless?
When will I receive my monthly phone bill?
Done
Trusted sites

Figure 143: Single-Level View in Browse

The first page offers the most general topics on the left with the questions from the selected topic displayed below; this page includes questions from the Most Popular Answers section at the bottom of the page. Icons on the right allow customers to return to the top level or the previous list or to conduct a standard search.

When a customer clicks a topic, a new page opens to display additional related topics.

Path: Find Answers>Browse>Click Topic


Find Answers - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Global Wireless
Support Home
Answers
Ask a Question
My Stuff
Login
Help
Search
Browse
Click on the following item which most closely matches your question...
Am I charged airtime when I check my voicemail from my wireless phone?
What is roaming?
What is a dropped call?
Which phones have text messaging?
Can you please send me information about calling plans?
How do I change my address?
Do you have service area maps?
What is airtime?
Are there any shortcuts for listening to voice messages?
Which phones are available for Global Wireless?
Return to top level
Back to previous level
If you do not see an answer to your question, try searching our knowledge base.
Trusted sites

Figure 144: Second Layer of Browse in the Single-Level View

As customers choose topics, their view of the knowledge base narrows; in this way, they are presented with only the immediate groupings of information related to their topic, not the entire knowledge base.

Browse with the multi-level view

The multi-level view provides customers with a graphical interface similar to a file management system. Customers can navigate the knowledge base tree hierarchy to find answers. This Browse option is designed for advanced users who know what they are looking for and want the freedom to view the topic clusters of the knowledge base to find their own answers.

Path: Find Answers>Browse


Find Answers - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Global Wireless
Support Home
Answers
Ask a Question
My Stuff
Login
Help
Search
Browse
Search Tips
Search by Keyword:
Search
Powered by RIGHT NOW
Topics
Most Popular Answers
Call, Global Wireless, Messaging Available, Charged Airtime, V200 Verden V300 (10)
Time, Customers Receive, Bill, Month, Weekend (2)
Most Popular Answers
Am I charged airtime when I check my voicemail from my wireless phone?
What is roaming?
What is a dropped call?
Which phones have text messaging?
Can you please send me information about calling plans?
What's the difference between Peak and Off-Peak time?
How do I change my address?
Do you have service area maps?
What is airtime?
Are there any shortcuts for listening to voice messages?
Which phones are available for Global Wireless?
When will I receive my monthly phone bill?
Trusted sites

Figure 145: Multi-Level View in Browse

When customers click a folder on the left, the files and folders in that branch or cluster are displayed on the right. (The Most Popular Answers folder opens by default.) Customers can then follow a branch by clicking a subordinate folder or view a specific answer by clicking a file.

When customers open a folder to see answers and subordinate folders, the top level folders remain visible. This enables customers to view the whole knowledge base while narrowing and focusing on a single answer. The open folder and its subordinates share a background color for easy identification of where the answers are in the folder list.

Using search text in Browse

Customers can also search in the Browse mode in the same way they would for a similar phrases search; however, the display of the search results is different.

Path: Find Answers>Browse (Multi-Level View)>Search


Find Answers - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Global Wireless
Support Home
Answers
Ask a Question
My Stuff
Login
Help
Search
Browse
Search Tips
Search by Keyword: roaming
Search
Topics (1 related Topics or Subtopics)
Most Popular Answers
Call, Global Wireless, Messaging Available, Charged Airtime, V200 Verden V300 (2 / 10)
Time, Customers Receive, Bill, Month, Weekend (0 / 2)
Answers in Selected Topic
What is roaming?
Can you please send me information about calling plans?
Am I charged airtime when I check my voicemail from my wireless phone?
What is a dropped call?
Which phones have text messaging?
How do I change my address?
Do you have service area maps?
What is airtime?
Are there any shortcuts for listening to voice messages?
Which phones are available for Global Wireless?
Trusted sites

Figure 146: Results from Searching in Browse

The left side of the Browse page always displays the topical structure of the knowledge base, represented in nested folders; on the right are the answers belonging to the selected topic or sub-topic. The best-matching answer is displayed on the right, and the corresponding topic folder on the left is automatically selected. Other answers in the same topic as the best-matching answer are also displayed in descending order of match strength.

Even if an answer does not contain a query term, it may be of interest because it is related to the same topic. An icon indicates the match strength of each answer, allowing customers to quickly identify the ones most likely to answer their question.

The topic folders on the left are also ordered according to the match strength of the answers they contain, and the same icons are used as for answers. In addition, the folder label notes how many matching answers it contains. Depending on the query, there may be matching answers in several topics, which customers can examine by clicking the folders or their labels.

Because the contents of a topic are suggested by the folder labels, customers may be able to find an answer more easily than by going through a long list of answers that partially match their query. The ordering of topics and answers and the icons indicating match strength remain unchanged until a new query is entered or the previous entry is cleared.

Searching with Web Indexer

The RightNow Service Web Indexer enables indexing and searching of documents that are not part of RightNow (for example, web pages, PDFs, and Microsoft Word documents). This feature makes it possible for you and your customers to find information within these documents when searching from the Find Answers page. Indexing and searching of external documents is possible if the documents are stored on a web server and are accessible through a URL. Your RightNow administrator must have configured your site for searching with Web Indexer.

Figure 147 shows search results on the Find Answers page using the Web Indexer.

Path: Find Answers>Documents


Find Answers - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Global Wireless
Support Home
Answers
Ask a Question
Live Help
My Stuff
Login
Help
Search
Browse
Documents
Keyword Search:
voicemail
Search
Match
Any
Sort By
Score
Powered by RIGHT NOW
Other Suggested Searches: voice message roaming charges text message wireless calling plans
7 Documents Found
1 How do I access my voicemail?
Press the "9" key and SEND to access your voicemail. Follow the instructions to enter your password
Size: 130 Updated: 01/01/2007 Score: 33
2 Am I charged airtime when I check my voicemail from my wireless phone?
Normal airtime charges apply when you check your voicemail from your wireless phone. It's
Size: 117 Updated: 01/01/2007 Score: 25
3 How do I set up my voicemail?
Press the "9" key and SEND and then follow the instructions to select a password and record a voice greeting for your mailbox.
Size: 129 Updated: 01/01/2007 Score: 25
4 http://www.rightnow.com/help/global/global.html
Indexing Globall Call plans Billing Voicemail
http://www.rightnow.com/help/global/global.html Size: 269 Updated: 01/01/2007 Score: 6
5 Are there any shortcuts for listening to voice messages?
Yes, there are voicemail shortcuts. While listening to a message, press: 1 - Rewind 2 - Pause 3
Size: 324 Updated: 01/01/2007 Score: 5
6 What is airtime?
Airtime is the time you spend connected to the Global Wireless Network. It's the time that passes between the moment you press SEND and the moment you press END. When you place calls or retrieve messages on your wireless phone, you use airtime.
Size: 247 Updated: 01/01/2007 Score: 3
7 Which phones are available for Global Wireless?
The following phones are available for Global Wireless: Conversa CA 9720 Conversa CA 9800 Conversa CA 9900 Mundo MD 5200 Mundo MD 6000 Mundo MD 6200 Forbindelse FN-763 Forbindelse FN-846 Forbindelse FN-910 Verden V100 Verden V200 Verden V300
Size: 244 Updated: 01/01/2007 Score: 1
Trusted sites

Figure 147: External Document Search Results

Customers can easily identify the document type in their search results when searching for an external document. All documents returned contain an icon identifying the document type. In addition, keywords are highlighted in the external document search results.

Table 50 describes the search and sort options for the Web Indexer.

Table 50: Web Indexer Search and Sort Options

Field	Description
Match	This drop-down menu specifies how the search is performed. **Note:** Search behavior depends, in part, on how your RightNow administrator has configured your site.
Any	Search results match any of the search terms.
All	Search results must match all of the search terms.
Complex	Search terms can use a logical expression, such as "phones AND accessories." Customers can use AND, NOT, and OR, and include * and ~ as wildcard characters.
Sort By	This drop-down menu specifies how the answers and web documents are sorted.
Score	Search results are displayed in descending order according to relevance (score).
Time	Search results are displayed in descending order according to the date of the document's time stamp or time the answer was last updated.
Title	Search results are displayed in alphabetical order.
Reverse Score	Search results are displayed in ascending order according to relevance (score).
Reverse Time	Search results are displayed in ascending order according to the document's time stamp or time the answer was last updated.
Reverse Title	Search results are displayed in reverse alphabetical order.

Previewing external documents

Customers can also preview external documents and search within those documents. The keywords or phrases returned from a search are highlighted in the document preview.

Path: Find Answers>Documents>Keyword Search>Search>Document Preview Link

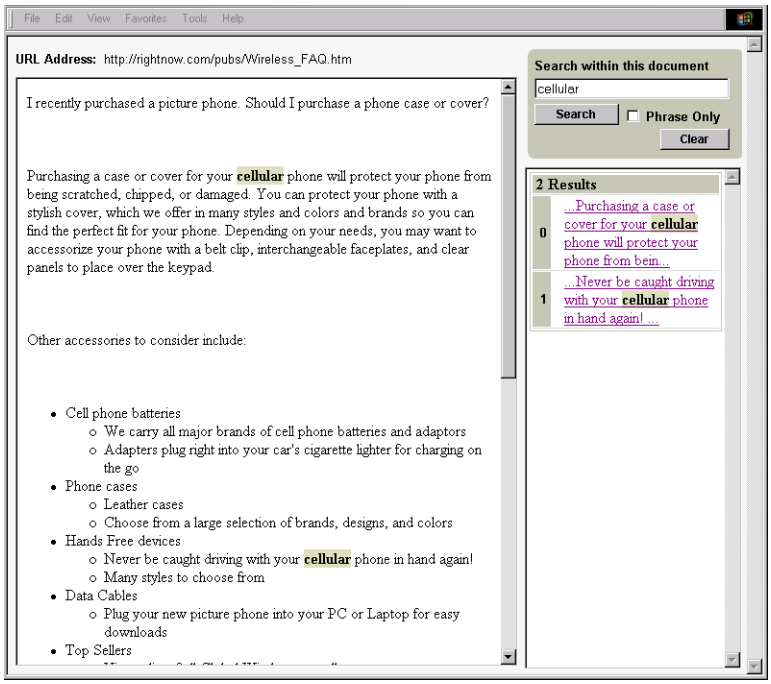

File Edit View Favorites Tools Help
URL Address: http://rightnow.com/pubs/Wireless_FAQ.htm
I recently purchased a picture phone. Should I purchase a phone case or cover?
Purchasing a case or cover for your cellular phone will protect your phone from being scratched, chipped, or damaged. You can protect your phone with a stylish cover, which we offer in many styles and colors and brands so you can find the perfect fit for your phone. Depending on your needs, you may want to accessorize your phone with a belt clip, interchangeable faceplates, and clear panels to place over the keypad.
Other accessories to consider include:
Cell phone batteries
We carry all major brands of cell phone batteries and adaptors
Adapters plug right into your car's cigarette lighter for charging on the go
Phone cases
Leather cases
Choose from a large selection of brands, designs, and colors
Hands Free devices
Never be caught driving with your cellular phone in hand again!
Many styles to choose from
Data Cables
Plug your new picture phone into your PC or Laptop for easy downloads
Top Sellers
Search within this document
cellular
Search
Phrase Only
Clear
2 Results
0
...Purchasing a case or cover for your cellular phone will protect your phone from bein...
1
...Never be caught driving with your cellular phone in hand again! ...

Figure 148: Previewing Results from a Web Indexer Search

Note In this example, the keyword "cellular" is highlighted in the external document and in the search results on the right side of the external document page.

Table 51 describes the options for previewing an external document.

Table 51: External Document Preview Description

Field/Button	Description
URL Address	This field displays the URL for the current document.
Search within this document	This field populates with the original keyword. You can type another keyword in this text box to search the document again.
Search	Click this button to search the current document for the specified keyword.

Table 51: External Document Preview Description (Continued)

Field/Button	Description
Phrase Only	Select this check box to search for a phrase. The results contain the entire phrase.
Clear	Click this button to clear the search results displayed in the Results section.
Results	This section displays the results returned in the search. The part of the sentence the keyword appears in displays as a link, with the keyword highlighted. Click a link to go to that section in the document.

Ask a Question

The Ask a Question component allows customers to submit questions when they cannot find an answer in your knowledge base. Customers must have a customer account to submit questions; however, in the default configuration, customers can create an account at the time they submit their question.

Important Your RightNow administrator can also restrict access to the Ask a Question page to only those customers who have a customer account and have been assigned an SLA instance (called a *contract* on the end-user interface) with Ask a Question permissions. For information on contracts, refer to "Contracts" on page 272.

When a customer clicks the Ask a Question link or tab, the Ask a Question page displays.

Path: Support Home>Ask a Question

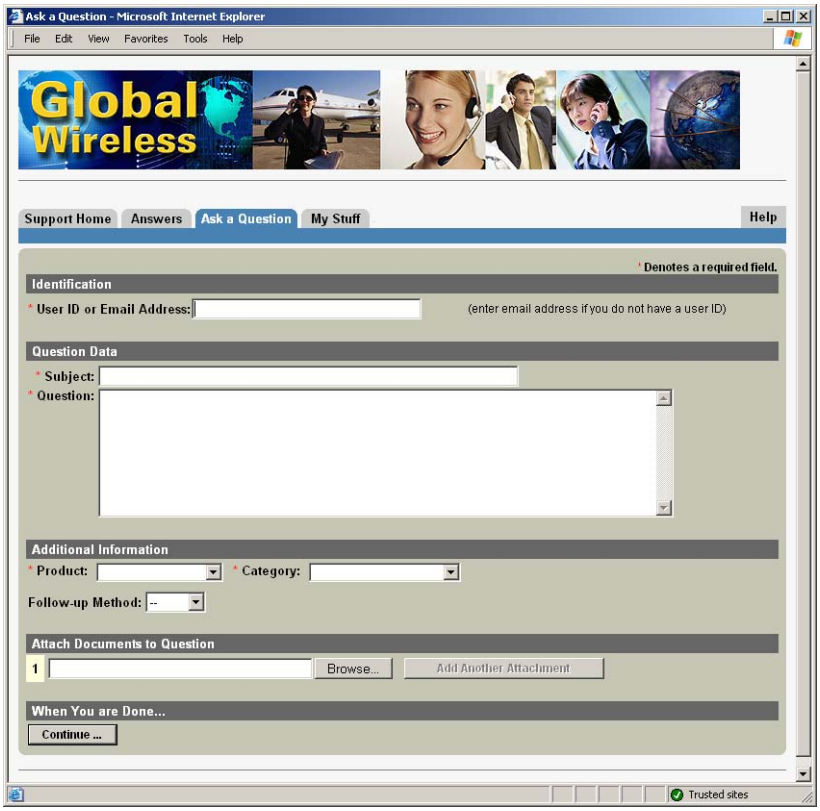


Figure 149: Ask a Question Page

Customers type their user ID (or their email address if they do not have an account) and then describe their question and select a product and category. They may also be able to attach files to their question. (When customers have already logged in during the session, the Ask a Question page does not contain the User ID field.)

Note Your administrator can also configure RightNow Service to display certain custom fields on the Ask a Question page. Figure 149 has a custom field for customers to specify their preferred follow-up method.

When customers with a customer account click the Continue button, the question is submitted and assigned a reference number. Customers are then notified that their question has been submitted.

Path: Support Home>Ask a Question>Continue

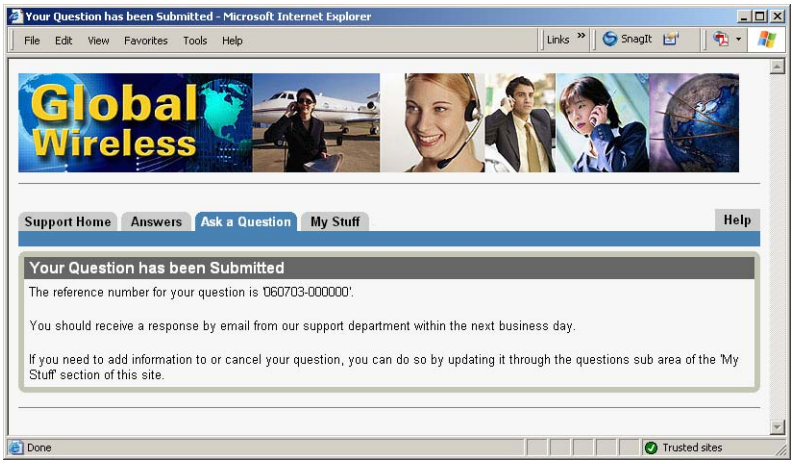

Your Question has been Submitted - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Links
SnagIt
Global Wireless
Support Home
Answers
Ask a Question
My Stuff
Help
Your Question has been Submitted
The reference number for your question is '060703-000000'.
You should receive a response by email from our support department within the next business day.
If you need to add information to or cancel your question, you can do so by updating it through the questions sub area of the 'My Stuff' section of this site.
Done
Trusted sites

Figure 150: Your Question Has Been Submitted Page

If customers do not have a customer account, the Create a New Account page opens after they click the Continue button. See "Security and login" on page 223 and "Creating an account" on page 225 for information.

Regardless of how your system is configured, all questions are immediately saved in the knowledge base as incidents. If incident queues have been implemented for your RightNow application, the incidents may be routed to a specific incident queue. Refer to "Filling your inbox" on page 26.

Viewing preliminary responses

RightNow Service can also be configured to provide a preliminary response to a customer's question. Using business rules, your RightNow administrator can set up RightNow Service to search the knowledge base for answers and present a list of possible answers when the customer clicks the Continue button. This feature can reduce the number of questions submitted to your support staff and offer customers an immediate response.

Path: Support Home>Ask a Question>Continue

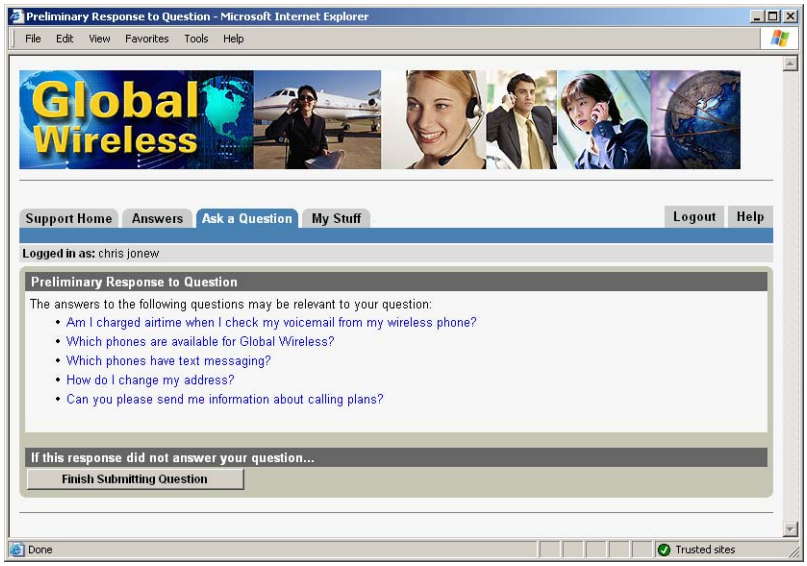

Preliminary Response to Question - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Global Wireless
Support Home
Answers
Ask a Question
My Stuff
Logout
Help
Logged in as: chris jonew
Preliminary Response to Question
The answers to the following questions may be relevant to your question:
Am I charged airtime when I check my voicemail from my wireless phone?
Which phones are available for Global Wireless?
Which phones have text messaging?
How do I change my address?
Can you please send me information about calling plans?
If this response did not answer your question...
Finish Submitting Question
Done
Trusted sites

Figure 151: Preliminary Response to Question Page

Customers can click a link to view an answer in a new window. If none of the suggested answers adequately answer their question, customers can click the Finish Submitting Question button to submit their question.

Live Assistance

RightNow Service provides two-way, real-time chat and telephone callback for customers who need immediate assistance. Customers can chat with RightNow Live agents (staff members with Live permissions assigned in their profile) or request a callback to speak directly with an agent.

Note Your RightNow administrator must have enabled and configured RightNow Live.

With chat and phone enabled, the Live Assistance page resembles Figure 152. To submit a chat or callback request, the customer fills in the required fields and clicks the Submit Request button.

Path: Support Home>Live Assistance



Figure 152: Live Assistance Page with Chat and Phone Support Enabled

If your site has only chat support enabled, the Live Assistance page resembles Figure 153.

Path: Support Home>Live Assistance>Chat Enabled

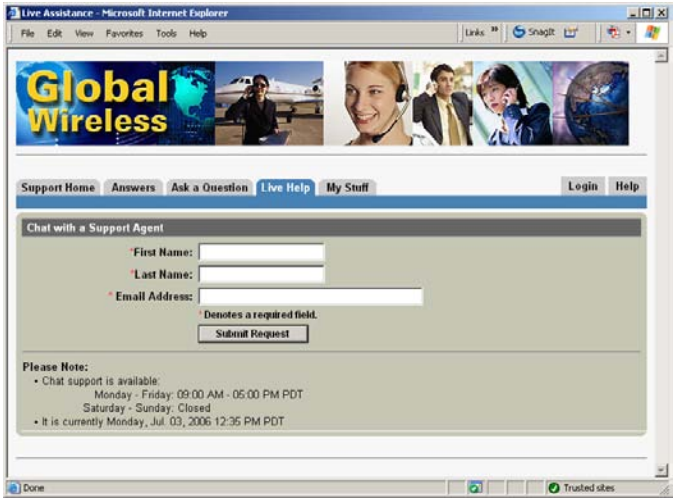


Figure 153: Live Assistance Page with Chat Support Only

If your site has only phone support enabled, the Live Assistance page resembles Figure 154.

Path: Support Home>Live Assistance>Phone Enabled

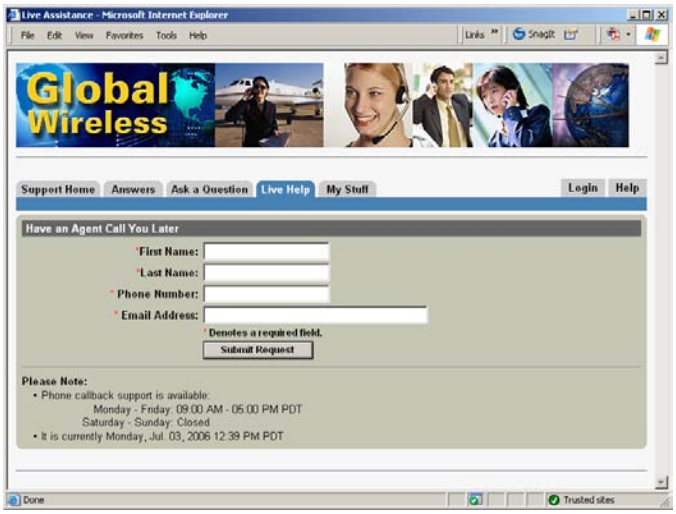


Figure 154: Live Assistance Page with Phone Support Only

My Stuff

The My Stuff component in RightNow Service allows customers to access information specific to their customer account. From the My Stuff page, customers can:

- View the questions they have previously submitted, check question status, and update questions with new information. See "Questions" on page 263.
- View the answer notifications they are subscribed to and renew or delete their subscriptions. See "Notifications" on page 267.
- Access profile information and make changes to search preferences and account information. See "Profile" on page 268.
- View and track their contracts with your organization. See "Contracts" on page 272.
- Change the password they use to log in. See "Change Password" on page 274.

To access My Stuff, customers must log in with their user ID (and password if required) or create an account. If a customer has not logged in during a session and clicks the My Stuff link or tab, the Support Login page opens. Once the customer logs in or creates an account, all options in My Stuff are available, starting at the My Overview page.

Path: Support Home>My Stuff>Login

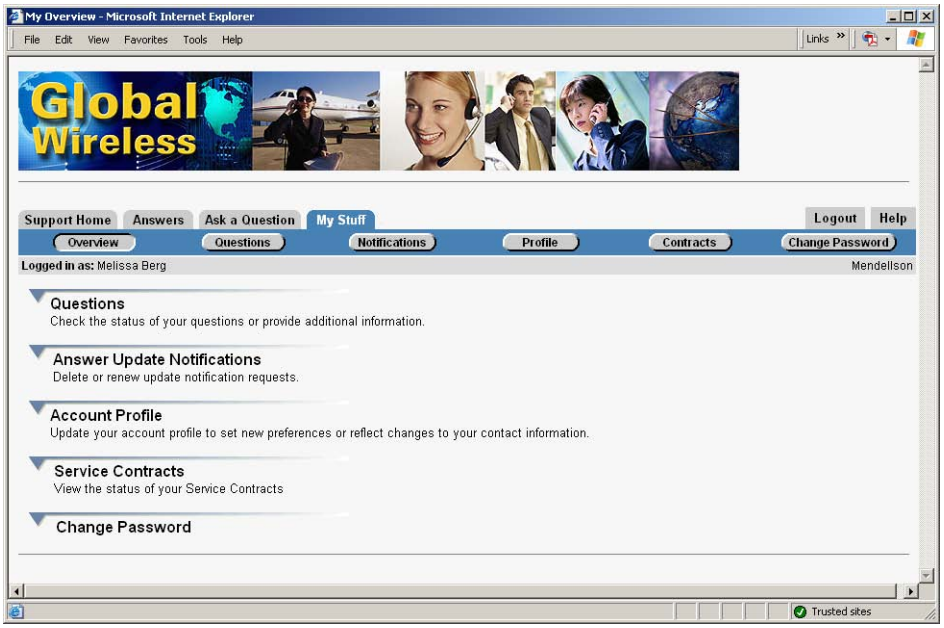


Figure 155: My Overview Page

The My Overview page displays links to questions, notifications, profile information, service contracts (if applicable), and customer password. Customers can access any area by clicking the buttons below the tab bar or the links on the page.

Questions

When customers click Questions, they are provided with a list of all questions they have submitted. (Customer questions show up as incidents on the administration interface.) Customers can track their questions, check the status and view details of their questions, and update their questions with new information. This option allows customers to manage their questions and can assist you in solving problems. For example, if a customer submits a vague question that you are unable to answer, the customer could add information to clarify the issue, saving you time and possibly helping you answer the question more quickly.

Note Your RightNow administrator can configure the My Questions page to allow customers who are associated with an organization to display all questions from other customers associated with the organization.

Path: Support Home>My Stuff>Login>Questions



Figure 156: My Questions Page

Viewing questions

As shown in Figure 156, customers can search the list of questions using search text and options in the Search By drop-down menu. The Search By drop-down menu includes Summary/Thread and Reference # to reflect these fields in the incident. Customers can also resort the results and view the details of each question by clicking the subject link. Additional fields contained on the My Questions page are described in Table 52.

Table 52: My Questions Page Description

Field	Description
Display all questions from my company	When the customer selects this check box, all of the questions associated with the customer's organization are displayed. **Note:** This option must be enabled for the check box to appear.
Reference #	This column displays the reference number of the question.
Status	This column displays the status of the incident.
Date Created	This column displays the date the question was first submitted by the customer or added by an agent.
Subject	This column displays the summary of the question.

When the customer clicks the subject link of a question, the View Question page opens.

Path: Support Home>My Stuff>Login>Questions>Subject Link

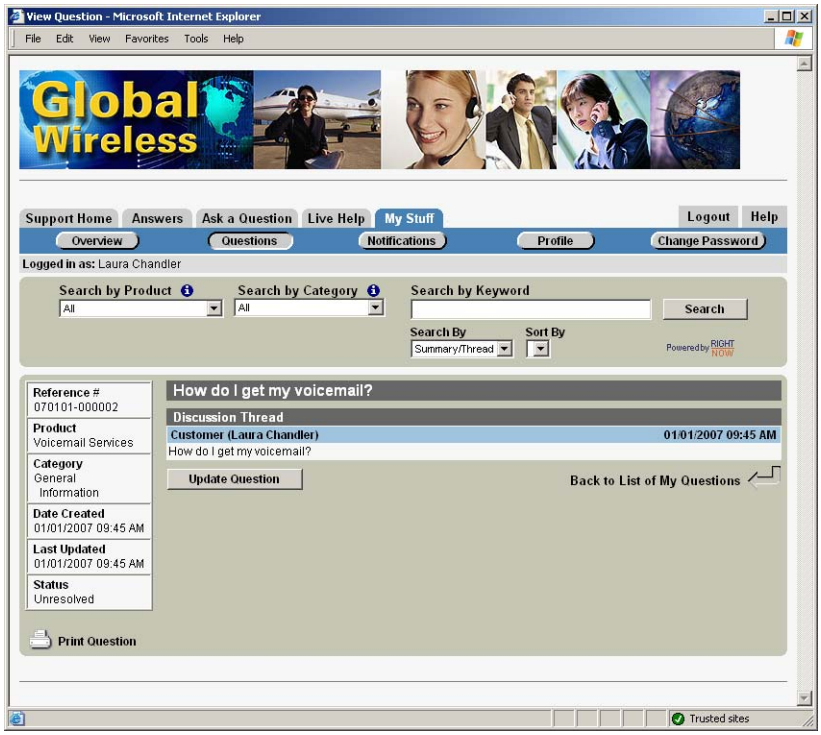


Figure 157: View Question Page

The top of the page contains the same search features as the My Questions page, enabling customers to quickly search for another question. On the left side of the page is a table displaying specific incident details (reference number, product, category, date created and last updated, and status) and any incident custom field information. If the incident has been solved, the date closed is also listed. In the middle of the page is the summary, question, and discussion thread of the incident.

Notice that customers have the option to print their question. This option is also available to customers when viewing answers. Refer to "Print an Answer" on page 235.

Updating questions

When viewing a particular question, customers may want to add information to clarify their issue. When customers click the Update Question button, the Update My Question page opens, and they can add information, attach a file, or indicate they no longer need an answer to the question.

Path: Support Home>My Stuff>Login>Questions>Subject Link>Update Question

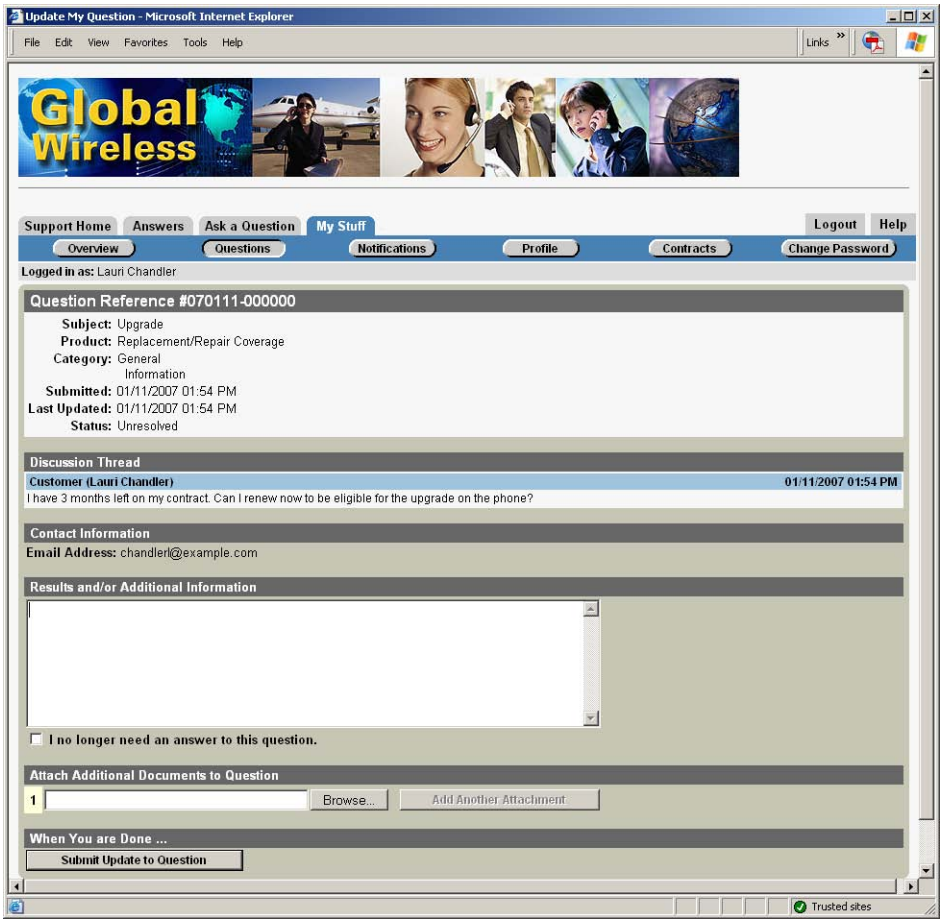


Figure 158: Update My Question Page

When the customer clicks the Submit Update to Question button, the question update and file attachments are appended to the original question. The status of the incident changes to Updated to alert you and other agents that the customer updated the question. The agent assigned to the incident receives a notification.

Note When the customer returns to the My Questions page, the question's status is changed to Updated.

In addition to updating questions, customers can also notify you when they no longer need an answer to a question. By selecting the I No Longer Need an Answer to This Question check box and clicking the Submit Update to Question button, the incident is set to the Solved status, and the agent assigned to the incident receives an update notification.

Notifications

The Notifications option in My Stuff displays all the answers customers have subscribed to and allows them to renew or delete their subscriptions. Customers can also subscribe to answer notifications for all levels of one product or category. (Refer to "Profile" on page 268.)

Note The knowledge engineer decides if and when to notify customers when an answer is updated. For example, if an answer is changed to correct a spelling error, the knowledge engineer may decide not to notify customers of the change since the content is unchanged. The knowledge engineer also specifies the time a notification is sent.

Path: Support Home>My Stuff>Login>Notifications

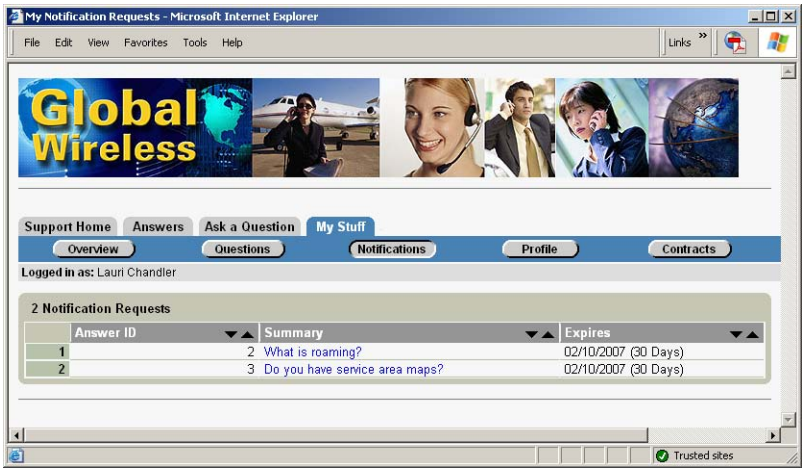


Figure 159: My Notification Requests Page

The My Notification Requests page displays the answer ID, subject, and expiration date of all the answers the customer is subscribed to. Your RightNow administrator can specify a subscription time period other than the thirty-day default.

By clicking an answer link, the Answer with Notification on Change page is displayed. In addition to viewing the answer details, customers can renew or delete their subscription to the answer, print the answer, or email the answer.

Path: Support Home>My Stuff>Login>Notifications>Subject Link

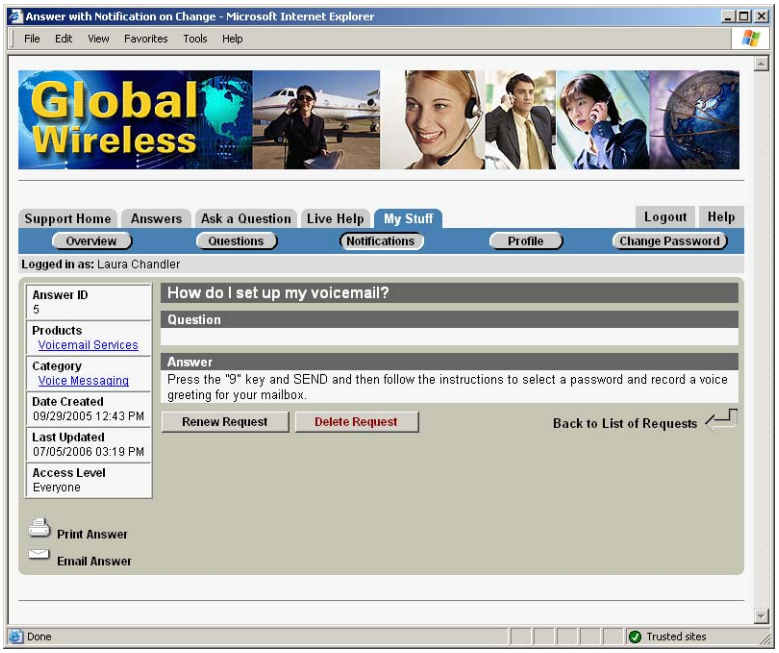


Figure 160: Answer with Notification on Change Page

Profile

The Profile option in My Stuff enables customers to view and edit their search preferences and account and contact information. By allowing customers to update their profile information, you eliminate a large part of the administrative tasks associated with maintaining contact and organization records.

Note Contact information is not updated if an email response is sent from a different email address. Instead, customers receive an automatic reply that instructs them to follow a link to the Support Login page so they can update their information through My Stuff.

Figure 161 shows the profile information that can be updated. In this configuration, products and categories have been defined.

Path: Support Home>My Stuff>Login>Profile

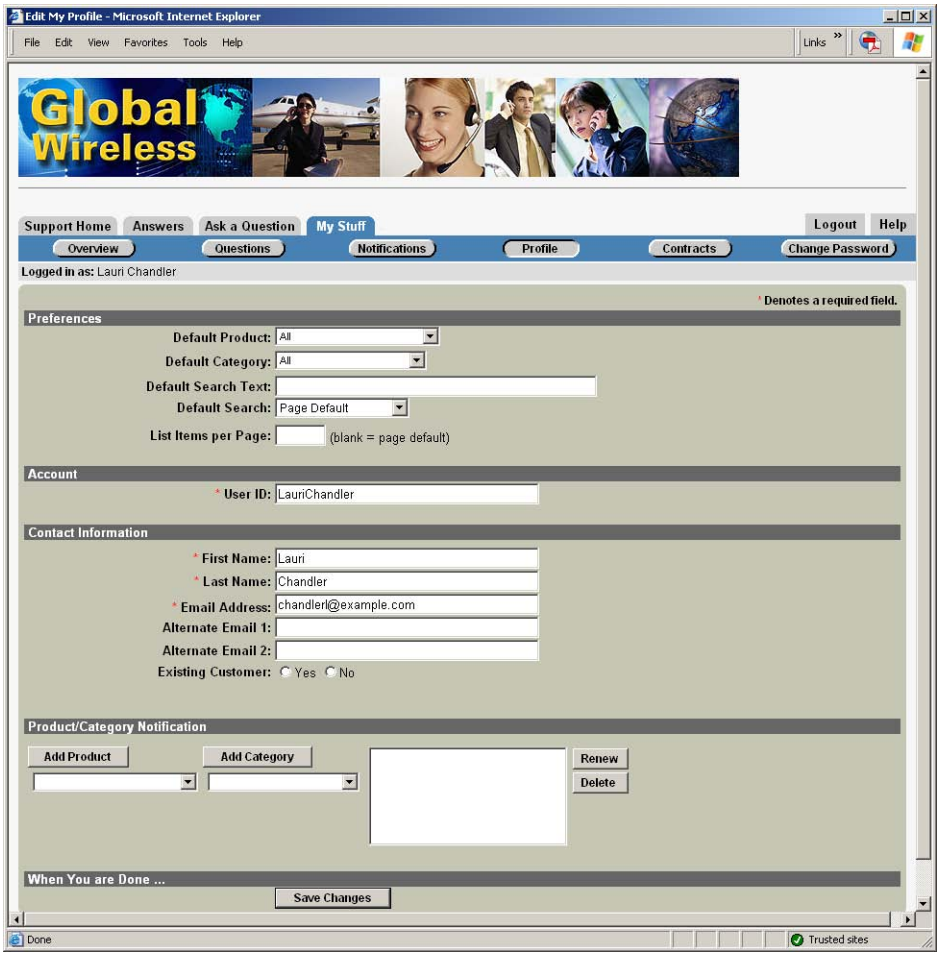


Figure 161: Edit My Profile Page

Table 53 describes the fields on the Edit My Profile page.

Table 53: Edit My Profile Page Description

Field/Button	Description
Preferences	This section contains the search and selection criteria customers can set that will be used to run the initial search when accessing the Find Answers page. **Note:** Customers must be logged in for their preferences to be reflected on the Find Answers page.
Default Product	Specifies the default product and additional levels of products used on the Find Answers page.
Default Category	Specifies the default category and additional levels of categories used on the Find Answers page.
Default Search Text	Specifies the default search text that populates the search text box.
Default Search	Specifies the default search criteria when customers open the Find Answers page. For information on search options, refer to "Search techniques" on page 242.
List Items per Page	Specifies the maximum number of answers displayed on the Find Answers page.
Account	This section lists the user ID for customers to log in.
User ID	Specifies the customer user ID. This value can be any combination of numbers and characters, except spaces and quotation marks.
Contact Information	This section contains customer first and last name, email address, and alternate email addresses.
*First Name	Specifies the customer's first name.
*Last Name	Specifies the customer's last name.
*Email Address	Specifies the primary email address used to identify the customer when logging in and for receiving email from RightNow.
Alternate Email 1	Specifies the first alternate email address.
Alternate Email 2	Specifies the second alternate email address.

Table 53: Edit My Profile Page Description (Continued)

Field/Button	Description
Product/Category Notification	This section contains the product and category lists so customers can be notified any time an answer in the product or category is updated. **Note:** This functionality must be enabled by your RightNow administrator.
Add Product	Customers click this button to add the product and/or additional levels of a product selected from the drop-down menu to their answer notification. Whenever an answer for that product or other levels of that product is added or updated, customers receive an answer notification.
Product	These drop-down menus contain the products and additional levels of products.
Add Category	Customers click this button to add the category and/or additional levels of a category selected from the drop-down menu to their answer notification. Whenever an answer for that category or other levels of that category is added or updated, customers receive an answer notification.
Category	These drop-down menus contain the categories and additional levels of categories.
List box	This box lists the current product or category notifications and their expiration dates.
Renew	Customers click this button to renew a product or category notification.
Delete	Customers click this button to delete a product or category notification.

After making changes and clicking the Save Changes button, the contact record is updated and the customer receives the message displayed in Figure 162.

Path: Support Home>My Stuff>Login>Profile>Save Changes

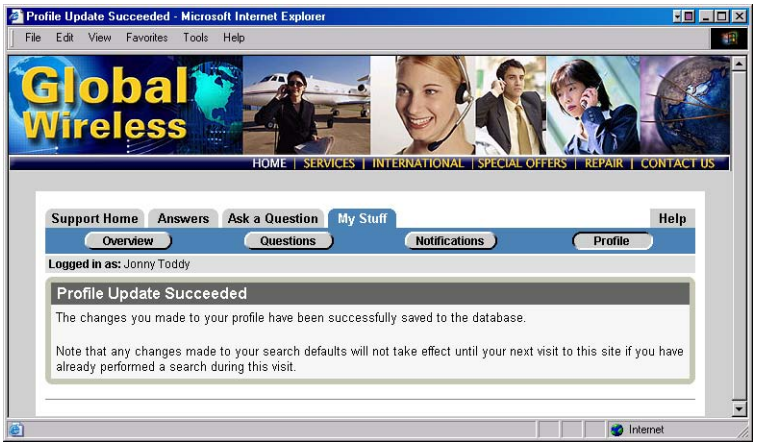

Profile Update Succeeded - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Global Wireless
HOME | SERVICES | INTERNATIONAL | SPECIAL OFFERS | REPAIR | CONTACT US
Support Home
Answers
Ask a Question
My Stuff
Help
Overview
Questions
Notifications
Profile
Logged in as: Jonny Toddy
Profile Update Succeeded
The changes you made to your profile have been successfully saved to the database.
Note that any changes made to your search defaults will not take effect until your next visit to this site if you have already performed a search during this visit.
Internet

Figure 162: Profile Update Succeeded Page

Contracts

When customers are assigned an SLA instance from their contact or organization record on the RightNow Console, they can view and track its status from My Stuff. SLAs are called *contracts* on the end-user interface.

From the My Contracts page, customers can see the total number of incidents allowed in their contract and the number of incidents remaining. They can also see the contract's activation and expiration dates and any custom answer access levels associated with their contract, which enables them to view privileged answers.

Note Your RightNow administrator must configure your application for SLAs and enable contracts on the end-user interface for this option to be available.

Path: Support Home>My Stuff>Login>Contracts



Figure 163: My Contracts Page

Refer to Table 54 for a description of the fields on the My Contracts page.

Table 54: My Contracts Page Description

Field	Description
Name	This field displays the contract name. (This is the name of the SLA defined by your RightNow administrator.)
Status	This field displays the status of the contract. Default statuses are Active and Inactive.
Active	A contract in Active status falls within the activation and expiration dates of the contract. Incident submittal is tracked and recorded for contracts with an Active status.
Inactive	A contract in Inactive status falls prior to the contract activation date. The contract will become active on the activation date.
Total Incidents	This field displays the total number of incidents that can be submitted based on the entitlements defined in the contract.
Remaining Incidents	This fields displays the remaining number of incidents that can be submitted by the customer.
Access Levels	This field displays the custom answer access levels defined in the contract.

Table 54: My Contracts Page Description (Continued)

Field	Description
Active Date	This field displays the activation date of the contract. Incident submittal is not tracked before the activation date.
Expire Date	This field displays the expiration date of the contract. Incident submittal is not tracked after the expiration date.

Change Password

The Change Password option in My Stuff enables customers to change the password they use to log in to My Stuff.

Path: Support Home>My Stuff>Login>Change Password

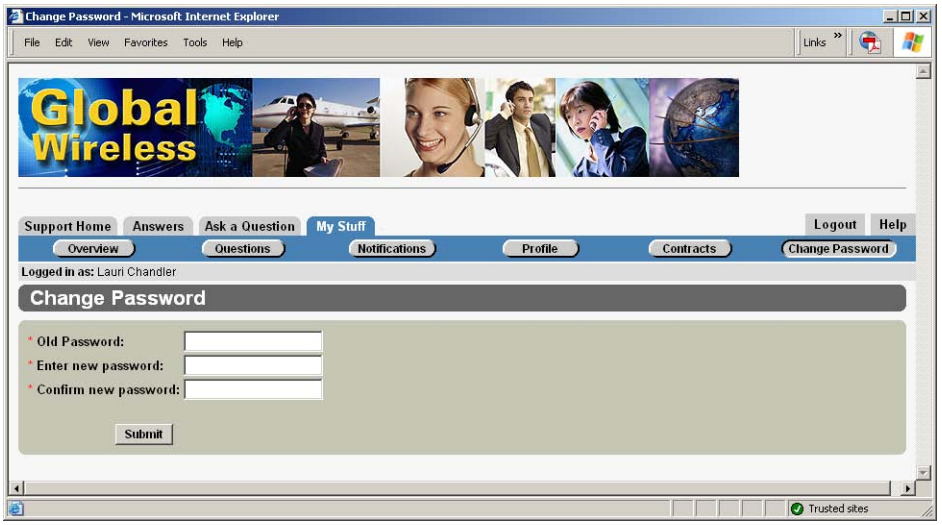


Figure 164: Change Password Page

Because the password field is not automatically populated, unauthorized users are prevented from reading the password if the page is viewed in source code.

Provide Feedback

The Provide Feedback component enables your customers to submit feedback to your organization about your web site, customer service, or product satisfaction. When customers click Provide Feedback on the Support Home page, a form opens where they can enter comments.

Note The Provide Feedback link is available only on the Support Home page.

Path: Support Home>Provide Feedback

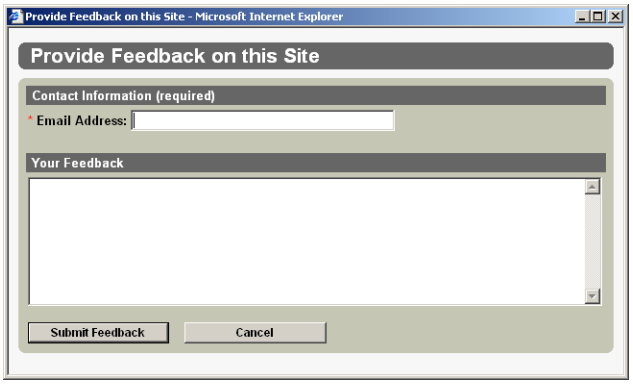


Figure 165: Provide Feedback on this Site Page

When customers click the Submit Feedback button, an incident is created in RightNow Service. The incident's contact information is populated through the customer's email address, and the Subject field is Site Feedback; the incident thread contains the customer's comments from the Your Feedback field. The site feedback incident can be routed to the appropriate staff member (either manually or through business rules) and can be used to update and improve your organization's web site and customer service.

Note Customers must enter the email address associated with their contact record in order to submit feedback.

Customers receive a confirmation message after submitting their feedback.

Help

When customers click the Help tab, they open a page containing general information about the functions on the end-user interface. Customers can also access search tips from this page.

Path: Help


Support Help - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Links
SnagIt
Global Wireless
Support Home
Answers
Ask a Question
My Stuff
Logout
Help
General Help
Search Tips
Logged in as: Steven Bryer
Answers Tab
Click this tab to search the knowledge base for answers using drop-down menus and search text. You can view a list of answers, sort answers, and page up or down. Click to sort a column in descending order or to sort the column in ascending order. To view answer details, click the subject link.
Answer Details
An answer details page includes the question and answer. From one of these pages, you can do the following:
• Notify me by Email if this Answer is Updated - Click this button to subscribe to an answer. Each time this answer is updated, you will be notified by email.
• Email Answer - Click this link to send the answer to an email address. You will be prompted for the recipient's email address.
• Print Answer - Click this link to print the answer.
• Submit Rating - This button allows you to rate the effectiveness of the answer.
Ask a Question Tab
When you are unable to find your answer by searching the knowledge base, you can submit a question to the support staff. If you don't already have an account, you will be asked for information needed to create a new account before your question is submitted.
My Stuff Tab
This tab contains your personal account information. You will need to log in to access these pages.
Questions Subtab
Click this subtab to view the list of all questions you have submitted. You can check the status of these questions, view the details of each question, update questions with new information, or indicate you no longer need an answer. To view the details to each question or update the information, click the subject link to view the details for that question. From there, you can update your question or indicate you no longer need an answer to the question.
Notifications Subtab
Click this subtab to view all the answers you have subscribed to and view the answers expiration dates. You will receive notifications by email when an answer you subscribed to is updated. Click the subject link to view more information about the answer. From there, you can delete the notification.
Trusted sites

Figure 166: Support Help Page

RightNow Wireless

Customers can also access the customer interface via their WAP (wireless application protocol) device or any device with a WAP browser, such as a personal digital assistant. After entering the URL of the RightNow Service customer WAP site, customers can access a limited Support Home page for viewing and searching for answers and asking questions.

The customer interface is accessed through the following URL:

```
http://<your_interface>.custhelp.com/cgi-bin/<your_interface>.cfg/php/
wap/enduser.php
```

If your site requires customers to log in with a user ID and password, the WAP interface will also require them to log in. Customers can then access their customer account in addition to all public features through the WAP site.

◈ **Tip** If your site does not require customers to log in, they can access all public features but not restricted functions such as My Stuff.

After typing the customer interface URL, the page that opens depends on whether the interface is password protected. If it is, the Support Login page is displayed.

Path: Customer URL

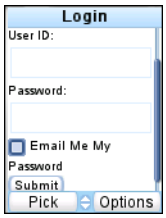


Figure 167: Support Login Page

Customers click Login, type their user ID and password, and press the Submit button to display the Support Home page.

Note On sites that are not password protected, the Support Home page opens after the URL is entered.

Path: Customer URL



Figure 168: Support Home Page

The functions on the Support Home page depend on the configuration of your customer interface, and can include the following options.

- **Find Answers**—To search the knowledge base. Refer to "Finding answers" on page 278.
- **Ask a Question**—To submit questions. Refer to "Asking a question" on page 281.
- **Login**—To log in to My Stuff. Refer to "My Stuff" on page 282.
- **Create a New Account**—To create an account. Refer to "Creating an account" on page 284.

Finding answers

The Find Answers option allows customers to search for answers by product, category, or keyword. When customers search by product or category, they can view a list of question summaries related to the specific product or category; then they can view a specific question description and answer. When searching by keyword, customers can type a word or phrase to search the knowledge base. RightNow Wireless then returns a list of question summaries containing the keyword or phrase, and customers can view question descriptions and answers.

Searching for answers by product or category

To search for answers by product or category, customers first select Find Answers on the Support Home page and then select Product Hierarchy or Category Hierarchy.

Path: Find Answers>Select

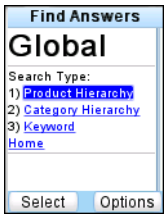


Figure 169: Selecting a Search Type

Then customers select a product or category to display a list of related answers.

Path: Find Answers>Select>Product Hierarchy>Select

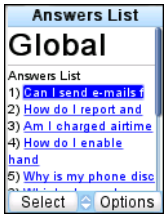


Figure 170: Answers List Page

After scrolling through the list of answers and selecting one to display, customers can select Solution to display the answer.

Path: Answer>Select>Solution>Select



Figure 171: Solution Displayed on the Answer Page

At this point, customers have three options. They can:

- Select Related Answers and press the Select button to view a list of SmartAssistant related answers.
- Select Answers and press the Select button to return to the Answers List page.
- Select Submit Feedback and press the Select button to submit feedback about the answer.

Searching for answers by keyword

Customers can also choose to search for an answer using a word or phrase. To search for answers by a keyword, customers first select Find Answers on the Support Home page and then select Keyword.

Path: Find Answers>Keyword>Select



Figure 172: Keyword Search Page

After customers enter keywords, a list of answers is displayed. Customers can then select answers to display them.

Path: Find Answers>Keyword>Submit

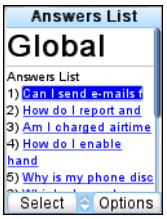


Figure 173: Answers List Page

Submitting feedback

When viewing answers, customers can rate answers and submit feedback on how the answer can be improved. This is the same feature described in "How Well Did This Answer Your Question?" on page 236.

From an Answer page, customers can select Submit Feedback to see the list of feedback options.

Path: Answer Page>Submit Feedback>Select

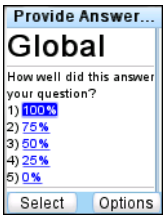


Figure 174: Selecting a Percentage

If customers select an option that is less than 100%, an answer feedback form opens, where they can enter and submit comments.

Path: Answer Page>Submit Feedback>Select>Less than 100%



Figure 175: Suggesting Improvements

Asking a question

When customers cannot find an answer to their question in your knowledge base, they can submit their questions to RightNow Service. The Ask a Question function on the Support Home page prompts customers to choose one or more product and category levels and complete any custom fields.

To ask a question, customers select Ask a Question on the Support Home page. If they are not already logged in, a login page opens. After logging in, customers can select a product to open the Ask a Question page, enter the question, and submit it.

Path: Ask a Question>Select>Product>Select>Select



Figure 176: Entering a Question

Note If there is not a contact record in the knowledge base that matches an email address entered by a customer, a record is added using only the email address. You must edit the contact record to add more information. Refer to the *RightNow 8.2 User Manual* to see how to edit contact information.

My Stuff

My Stuff contains your customers' personal account information where they can view and edit any questions they have submitted and update their profile information. To access My Stuff, customers must log in with their user ID and password or create an account. For more information about the My Stuff page, refer to "My Stuff" on page 262.

After logging in, customers open the Support Home page with My Stuff options. From this page, the following options are available.

- View a question
- Update a question
- Access account profile information

To view a question, customers first select My Questions and then select the question to view. From the open question, they can select options to update the question, return to the questions list, or return to the Support Home Page.

Path: Login>My Questions>Select>Select Question>Select



Figure 177: Viewing a Question

To update a question while viewing it, customers select Update Question and then enter additional information about the question in the text field. The I No Longer Need An Answer To This Question option can be cleared on this page.

Path: View Question>Update Question>Select



Figure 178: Updating a Question

To access account profile information, customers select Account Profile from the Support Home page. On the Edit My Profile page, customers can update first and last names and email addresses.

Path: Support Home>Login>Select>Account Profile>Select



Figure 179: Edit My Profile Page

Creating an account

When customers visit your Support Home page for the first time, they can create an account to use when submitting, updating, or tracking questions from their WAP device.

Note If a password is required on the Support Home Page, customers cannot create a new account from their WAP device.

To create an account, customers select Create a New Account from the Support Home page and enter the following information.

- User ID—The customer-defined user ID that can be any combination of numbers and characters except spaces and quotation marks.
- Password—The customer-defined password for the account.
- Email Address—The customer's email address.
- First Name—The customer's first name.
- Last Name—The customer's last name.

Path: Support Home>Create a New Account>Select



Figure 180: Create a New Account Page

6

Offer Advisor

As an agent, you are in a unique position to anticipate customers' needs and provide them with specifically targeted information. Offer Advisor identifies current promotions that customers are eligible for and generates product suggestions based on their purchase histories.

Offer Advisor does more than simply provide you with list of offers. It also displays guides to help you present the offer or information to the customer. It may contain product information and direct you to URLs to enter information about orders or leads. Offer Advisor can help you deliver high levels of personalized customer service by providing customers with reminders and service opportunities.

In this chapter

- **What is Offer Advisor?**—Contains an overview of Offer Advisor and describes promotions and suggestions. Refer to page 286.
- **Opening Offer Advisor**—Describes how to open the Offer Advisor window while working with an incident and provides an overview of the window. Refer to page 287.
- **Presenting offers**—Contains procedures to select promotions and suggestions, enter search terms, and present offers. Refer to page 291.

What is Offer Advisor?

Promotions are special offers made to specific groups of customers. Examples of promotions include free shipping for customers who buy certain products, extended warranties for customers whose basic warranty is about to expire, and discounted prices on accessories for products customers have already purchased. A staff member in your organization, usually from the marketing department, defines a promotion.

Suggestions, on the other hand, are generated automatically. These are product recommendations based on customer characteristics and purchase history. Just as SmartAssistant searches the knowledge base and suggests possible answers to a customer's questions, Offer Advisor searches for customer characteristics and past purchases to suggest possible products they may be interested in. For example, Offer Advisor may suggest a Caribbean cruise to a customer who has previously purchased a Mexican cruise vacation.

When you open an incident, Offer Advisor evaluates the customer's information and looks for promotions and product suggestions. If it finds promotions or suggestions or both, the Offer Advisor button on the toolbar is enabled; if no offers are available, the button is disabled.

You can click the Offer Advisor button to open the Offer Advisor window and review the promotions and suggestions before selecting the most appropriate ones to present to the customer. Each promotion and suggestion contains additional information to help you provide more details to the customer. You can also enter search terms that match the customer's interests, and Offer Advisor revises the order of the promotions and suggestions according to how well they match the terms you enter.

Opening Offer Advisor

Offer Advisor evaluates customer information when you open an incident, searching for promotions the customer is eligible for and product suggestions that the customer might be interested in. If it finds promotions, product suggestions, or both, the Offer Advisor button is enabled on the toolbar.

After you solve the incident, click the Offer Advisor button to display the Offer Advisor window containing promotions and suggestions.

Path: Offer Advisor

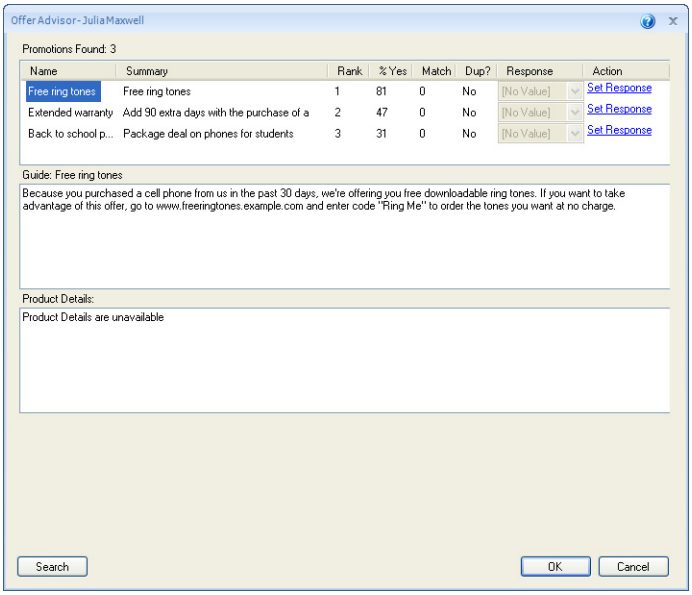


Figure 181: Offer Advisor Window

Notice that the customer's name appears in the title bar of the Offer Advisor window.

The following sections describe the information on the Offer Advisor window.

Promotions Found

The Promotions Found section of the Offer Advisor window displays promotions the customer is eligible for. The maximum number of displayed promotions has been set by your RightNow administrator, so it is possible that the customer is eligible for other lower-ranking promotions that do not appear unless you scroll down.

Note If the customer previously expressed no interest in a promotion, the promotion does not appear on the Offer Advisor window, and you will not be put in the position of presenting a promotion the customer has already rejected. Nor will the product associated with the rejected promotion appear in the Suggestions Found list.

Path: Offer Advisor

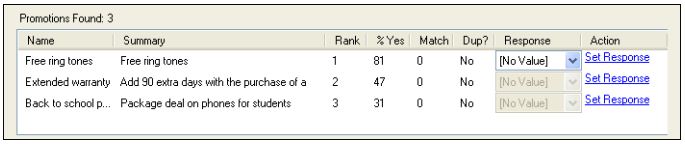


Figure 182: Promotions Found on the Offer Advisor Window

You can revise the order of the promotions using any of the column headings in the Promotions Found section, although the Rank, % Yes, and Match columns are the most useful. The Name column is simply the name assigned to the promotion by the marketing staff member who developed it. The Summary column provides a brief overview of the promotion.

Promotions are initially ranked by priority, which is the relative importance assigned to it by the staff member who created it. These values appear in the Rank column. A rank of 1 indicates the highest priority; however, multiple promotions that have the same priority are not differentiated by rank in this list, so lower promotions may have the same priority as the first promotion.

The % Yes column lists the historical response rate, which is the percentage of times customers have accepted this promotion. To rearrange the promotions in order of acceptance, click the column heading.

Offer Advisor allows you to enter search terms that indicate the customer's interest. The Match column prioritizes promotions based on how well your search terms match keywords and other text of the promotion or product. To list the promotions in order of match, where a high value indicates a strong match, click the Match column heading. Lower-ranking promo-

tions that did not appear when the list was prioritized by rank may now be displayed based on their match with the search terms you entered. To learn how to search for matches, refer to "To enter search terms:" on page 291.

The column titled Dup? is used to indicate whether the product in the promotion is duplicated in a suggestion. If the same product appears in Promotions Found and Suggestions Found, the Dup? value in the row is Yes and is highlighted in green.

Path: Offer Advisor

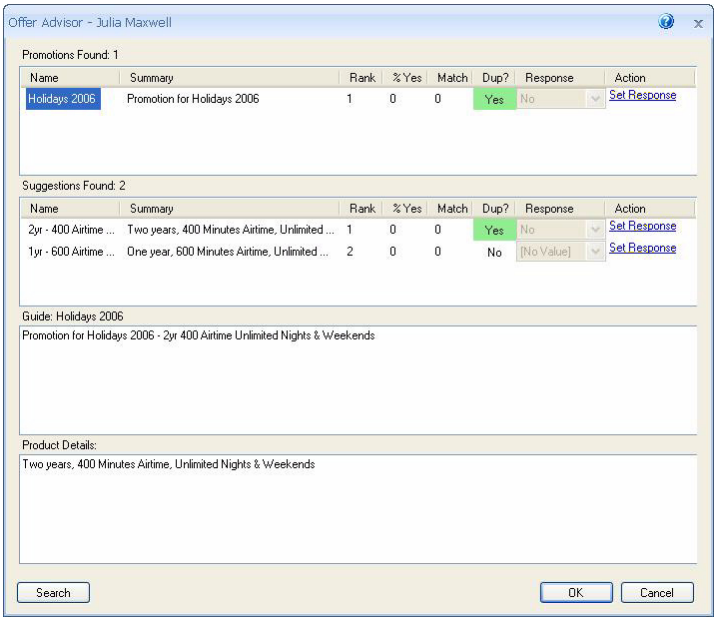


Figure 183: Duplicate Promotion and Suggestion on the Offer Advisor Window

Suggestions Found

The Suggestions Found section of the Offer Advisor window displays recommendations for products that Offer Advisor has determined are a good fit for the customer. The maximum number of displayed suggestions has been set by your RightNow administrator, so it is possible that other lower-ranking suggestions are available even though they may not appear until you scroll down.

Just as you can with promotions, you can revise the order of suggestions using the Rank, % Yes, and Match columns.

Guide

The guide section of the Offer Advisor window contains information about a selected promotion. This information was entered for your use by the marketing staff member who created the promotion. Depending on your organization's practices, the information may be a script for a phone conversation, text you can enter into an email response, or simply talking points for the promotion. For example, if most of your customer support requests come through phone calls, the marketing staff member may write a general script for you to use when talking with a customer. If your main channel of communication with customers is through email, the guide may contain text you can copy or append to the response.

Note The guide section displays "Offer Guide is unavailable" if you have selected a suggestion instead of a promotion or if marketing personnel did not enter information when creating the promotion.

Path: Offer Advisor

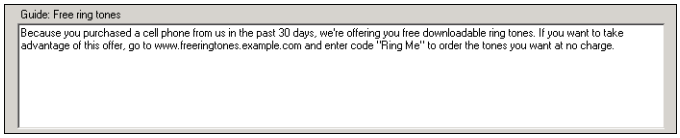

Guide: Free ring tones
Because you purchased a cell phone from us in the past 30 days, we're offering you free downloadable ring tones. If you want to take advantage of this offer, go to www.freeringtones.example.com and enter code "Ring Me" to order the tones you want at no charge.

Figure 184: Guide on the Offer Advisor Window

To copy information in the guide to paste in the response, right-click in the Guide section and select Copy. Or you can append the information to the response by right-clicking and selecting Append To Thread.

Product Details

The Product Details section contains information from the Sales Product Catalog about the selected product suggestion or the product for the selected promotion. (Promotions do not require an associated product; if the selected promotion does not involve a product, this section displays "Product Details are unavailable.")

Path: Offer Advisor

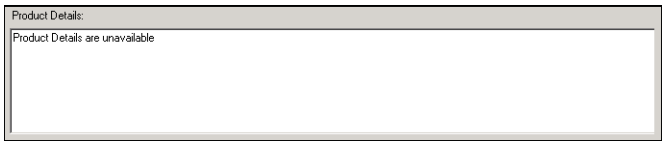


Figure 185: Product Details on the Offer Advisor Window

To copy information in the Product Details section to paste in the response, right-click in the Product Details section and select Copy. Or you can append the information to the response by right-clicking and selecting Append To Thread.

Presenting offers

After you have opened the Offer Advisor window and reviewed the promotions and suggestions, you can select one to present to the customer. You can revise the order of the lists of promotions and suggestions to help you decide which offer has the highest potential of success. You can select the offer's rank or its acceptance rate, or you can enter search terms to determine how well the offer matches the customer's interests and use the match value as your selection criterion.

◇ **Tip** You should strongly consider any offer with Yes displayed on a green background in the Dup? column. This indicates a product that appears in both promotions and suggestions.

To select a promotion or suggestion:

To use rank as the selection criterion, select the promotion or suggestion ranked 1.
Or
To use acceptance rate, click the % Yes column heading to list the promotions in order of acceptance rate.

To enter search terms:

1 To search for matched terms, click the Search button on the bottom of the Offer Advisor window.

Path: Offer Advisor>Search

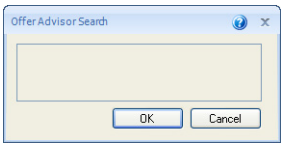


Figure 186: Searching for Matched Terms in Offers

2 Type the search terms, separated by a space or comma, and click the OK button. The list of offers is automatically ranked according to match value.

Note The search terms you enter are applied only to the promotions and suggestions available to this customer, not to all promotions and suggestions.

To present an offer:

1 If you are on a phone call with the customer, read or paraphrase the guide and product information to the customer.
Or
If you are responding to an incident, right-click in the guide or product information section to copy the text or append it to the response. Modify as necessary before sending the response.

2 Click Set Response in the Action column for the offer you want to present. The associated drop-down menu in the Response column is activated.

3 Click the drop-down menu and select one of the options in Table 55.

Table 55: Offer Advisor Response Options

Option	Description
Yes	Select this option if the customer accepts the offer. Depending on how the promotion is defined or how Offer Advisor is configured, this button may take you to a URL for follow-up action (for example, an order form).
Interest	Select this option if the customer expresses interest in the offer but is not ready to accept it. Depending on how the promotion is defined or how Offer Advisor is configured, this button may take you to a URL for follow-up action.

Table 55: Offer Advisor Response Options (Continued)

Option	Description
No	Select this option to indicate the customer's lack of interest in the offer. The promotion or suggestion is disabled in the Offer Advisor window, and the response is recorded to prevent the offer from being made to this customer in the future.
Defer	Select this option when you are sending the offer by email and do not yet know the customer's response.

4 Click the OK button to return to the incident.

5 Click the Save and Close button to save the incident and record the customer's responses to the offers. If you do not save the responses, the reports generated by managers and marketing staff will not account for these responses, and the historical information with this customer will not be accurate for future interactions.

Note If you send an email to a customer who replies with an indication of interest, you can reopen the incident, open the Offer Advisor window, select the promotion or suggestion, and select Yes, Interest, or No to document the response appropriately.

7

Incident Archiving

As an agent, you may need to reference outdated incidents in order to better serve your customers. With RightNow Service, you can search for and view incidents that have been removed from your knowledge base and archived by your RightNow administrator. Archived incidents display as read-only text.

In this chapter

- **Accessing archived incidents**—Contains the procedure for accessing archived incidents. Refer to page 296.
- **Searching for archived incidents**—Contains the procedure to search for archived incidents that meet specific criteria. Also contains procedures to view and print archived incidents. Refer to page 298.

Accessing archived incidents

You can access archived incidents from the RightNow Console. Archived incident information is read-only and cannot be updated. Refer to Table 58 on page 300 for a description of the information available when you access archived incidents.

Note Archived incidents will not appear unless your RightNow administrator has configured incident archiving and archived incidents.

To access archived incidents:

1 Click the navigation button that contains the Archived Incidents component.

Tip Contact your RightNow administrator if you are unsure of this component's location.

2 Double-click Archived Incidents.

Path: Double-Click Archived Incidents

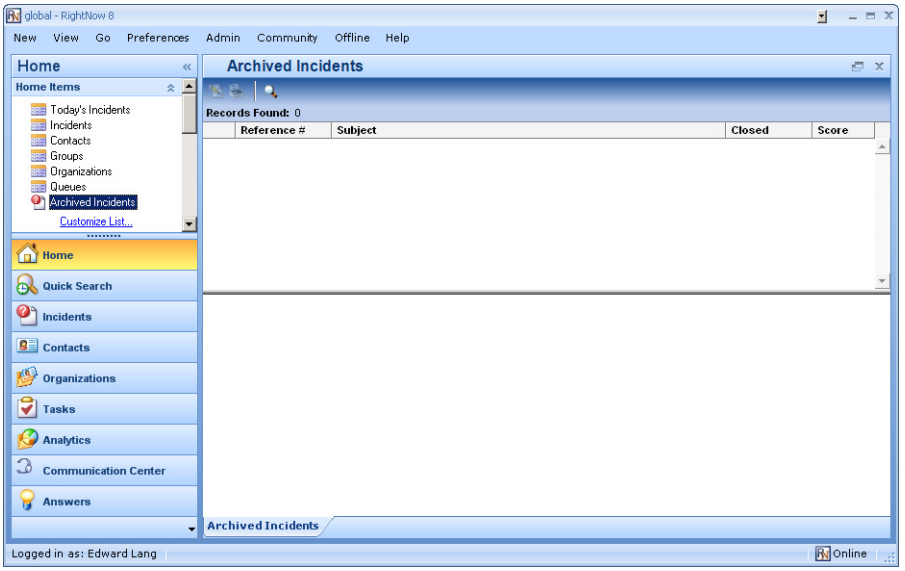


Figure 187: Accessing Archived Incidents

Important When you open the Archived Incidents component, no records will be displayed. You must perform a search to display archived incidents. For information on searching for archived incidents, refer to "Searching for archived incidents" on page 298.

Toolbar

A standard toolbar exists for working with archived incidents. Table 56 describes the buttons on this toolbar and the information that displays.

Table 56: Archived Incidents Description

Field/Button	Description
 **View Incident**	Click this button to view the selected incident. Refer to "To view incident information:" on page 300.
 **Print**	Click this button to print the selected incident. Refer to "To print an archived incident:" on page 301.
 **Search Incidents**	Click this button to search for an archived incident. Refer to "To search for archived incidents:" on page 298.
Reference #	Displays the reference number for each incident returned in the search results.
Subject	Displays the subject of the incident.
Closed	Displays the date the incident was closed.
Score	Displays the score count for the incident.

The next section contains the procedure for searching for archived incidents.

Searching for archived incidents

You can search for archived incidents that meet certain search criteria. Because archived incidents have been removed from the database and converted to a text format, you can only search for incidents with a single text search. The following incident fields are searchable:

- Incident reference number
- Subject
- Discussion thread
- Product
- Additional levels of a product
- Category
- Additional levels of a category
- Incident custom fields

You cannot search by contact name, organization name, or any other contact- or organization-related fields.

Note When searching for archived incidents, a Boolean AND is used between words by default. For example, if you search for the words "incident" and "archive," only incidents containing both words will be returned by the search.

To search for archived incidents:

1 Click the Search Incidents button. The Search window will open.

Path: Archived Incidents>Search Incidents

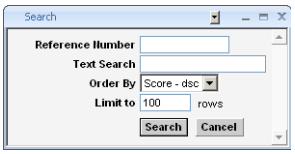


Figure 188: Search Window

2 Enter field information described in Table 57.

Table 57: Search Window Description

Field/Button	Description
Reference Number	Type the reference number of the incident in this text box.
Text Search	Type a word or phrase in this text box.
Order By	Click this drop-down menu to select a sort order.
Limit to	Type a number in this text box to limit the number of incidents to return from the search. The default is 100.

3 Click the Search button to query the database for incidents that meet your search criteria. There is an implicit wildcard at the end of the search string.

Path: Archived Incidents>Search Incidents>Search

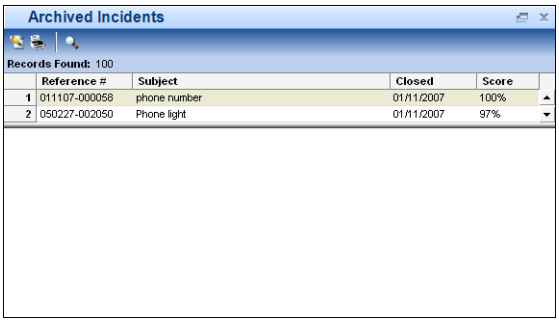


Figure 189: Results from an Archived Incidents Search

Viewing archived incidents

Once your search results are displayed, you can view the details of each incident, including the incident thread, details, audit log, and contact information.

Note RightNow workspaces do not apply to archived incidents. Therefore, the layout of archived incidents and the location of certain fields will be different from the way incidents display in RightNow 8.2.

To view incident information:

1 Double-click an archived incident.

Or

Select an archived incident and click the View Incident button.

Path: Archived Incidents>Double-Click Incident


Archived Incidents
Records Found: 100
Reference #
Subject
Closed
Score
1 011107-000058 phone number 01/11/2007 100%
2 050227-002050 Phone light 01/11/2007 97%
Incident sidebar
Reference # 011107-000058
Contact E-mail luckyducck@ example.com
Status Solved
Assigned to ET CSR 1 / Tech Ronald
Interface tech
Product My Game Is Not Listed
Messages
Details
Audit Log
Contact
Record tabs
Summary: phone number
Customer:
Staff:
Response (Tech Ronald) 11/10/2001 05:25 AM CST
At 11/10/2001 06:23 AM we wrote -
Hello,
Open up your Alliance application. Click on Options and select Go to account management. From this page you can change your preferences so that you don□t receive any more phone calls.
Thanks,
Rakesh Kumar
Customer (Sharon Hitchcock) 11/06/2001 11:35 PM CST
---- 11/07/2001 12:35 AM ----------
i put the wrong number and now have decided not to play because i have children who will answer the phone what can i do

Figure 190: Viewing an Archived Incident

Table 58 describes the display of field information for archived incidents.

Table 58: Archived Incidents Description

Sidebar/Tab	Description
Incident sidebar	Displays the incident reference number, the staff member and queue the incident was last assigned to, the interface name, and any customizable menu items that apply to the incident such as product, category, and incident disposition.
Messages	Displays the incident's discussion thread (this is the active tab).
Details	Displays the source of the incident and any custom fields associated with the incident.

Table 58: Archived Incidents Description (Continued)

Sidebar/Tab	Description
Audit Log	Displays the history of all actions taken on the incident by the incident originator, agents, and the system, and the date of each action.
Contact	Displays the contact's information, including name, email address, login, date created, and date updated.

To print an archived incident:

1 Select the archived incident you want to print and click the Print button. A new window will open and display a basic text version of the incident.

2 From the menu, click File and select Print. A print window will appear allowing you to choose printer options.

8

Accessibility Interface

RightNow Service contains an accessibility interface, sometimes called a *thin client*, to comply with Section 508 of the Rehabilitation Act. This non-graphical interface allows staff members to view messages and add and edit incidents and answers. All mouse functionality can be accomplished with keystrokes to make navigation simple and fast. The accessibility interface can be combined with a software reader for vision-impaired staff members, but other staff members may prefer to use this interface as well.

In this chapter

- **Logging in to the accessibility interface**—Contains the procedure to log in to the accessibility interface. Refer to page 304.
- **Working on the Session Console**— Describes the Session Console and how to navigate the accessibility interface. Refer to page 306.
- **Working on the Support Console**—Contains an overview of the Support Console and the procedures to add and edit incidents, organizations, and contacts. Refer to page 308.
- **Working on the Answer Console**—Contains an overview of the Answer Console and the procedure to add and edit answers. Refer to page 323.

Logging in to the accessibility interface

All staff members with a valid user name (login) and password can log in to the accessibility interface from the RightNow Entry Setup window. This thin client version of RightNow Service allows you to view your notifications and add and edit incidents and answers using a simplified non-graphical interface.

To log in to the accessibility interface:

1 Open your web browser and type:

```
http://<your_interface>.custhelp.com/cgi-bin/<your_interface>.cfg/
php/admin/launch.php
```

For additional information about logging in to RightNow, refer to the *RightNow 8.2 User Manual*.

Path: URL

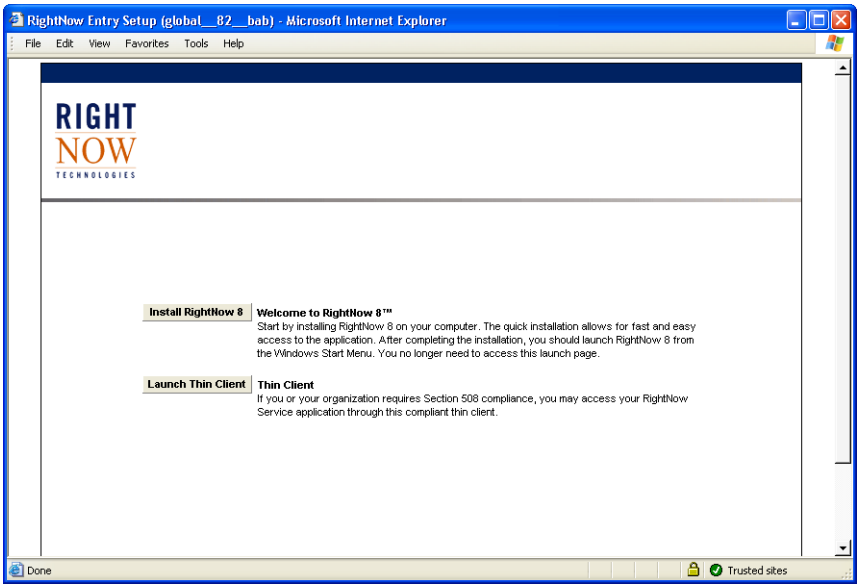

RightNow Entry Setup (global__82__bab) - Microsoft Internet Explorer
File Edit View Favorites Tools Help
RIGHT NOW TECHNOLOGIES
Install RightNow 8
Welcome to RightNow 8™
Start by installing RightNow 8 on your computer. The quick installation allows for fast and easy access to the application. After completing the installation, you should launch RightNow 8 from the Windows Start Menu. You no longer need to access this launch page.
Launch Thin Client
Thin Client
If you or your organization requires Section 508 compliance, you may access your RightNow Service application through this compliant thin client.
Done
Trusted sites

Figure 191: RightNow Entry Setup Window

2 Click the Launch Thin Client button to open the Login window.

Path: URL>Launch Thin Client

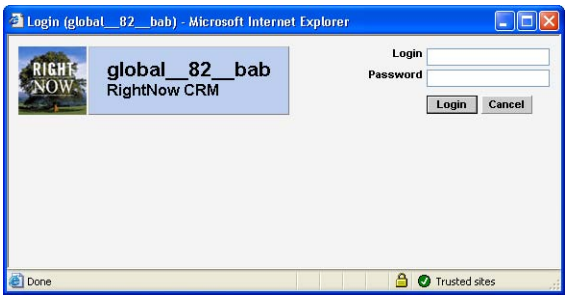


Figure 192: Logging in to the RightNow Accessibility Interface

Important Your login name and password are defined in your staff account; both are case sensitive. If you have any problem logging in, contact your RightNow administrator.

3 Type your login in the Login field.

4 If you have been assigned a password, type it in the Password field. (Passwords are optional.)

5 Click the Login button to open the Session Console.

Working on the Session Console

You can navigate the accessibility interface using either a mouse or a keyboard or both. Using a mouse, you can click any of the available options to perform an action. On the keyboard, you can tab through the options until you reach the one you want, or you can use key combinations to select them directly. Press **Alt** before the selected character to perform the action; for example, press **Alt+s** on the Session Console when you want to open the Support Console.

After selecting an option by pressing **Tab** or an **Alt+key** combination, press **Enter** to perform the action.

Note If your workstation has a software reader, it can read the fields and summaries as you work.

The Session Console displays a list of your messages and allows you to access the Support and Answer Consoles and log out of RightNow Service. The Session Console is shown in Figure 193.

Path: URL>Launch Thin Client>Login

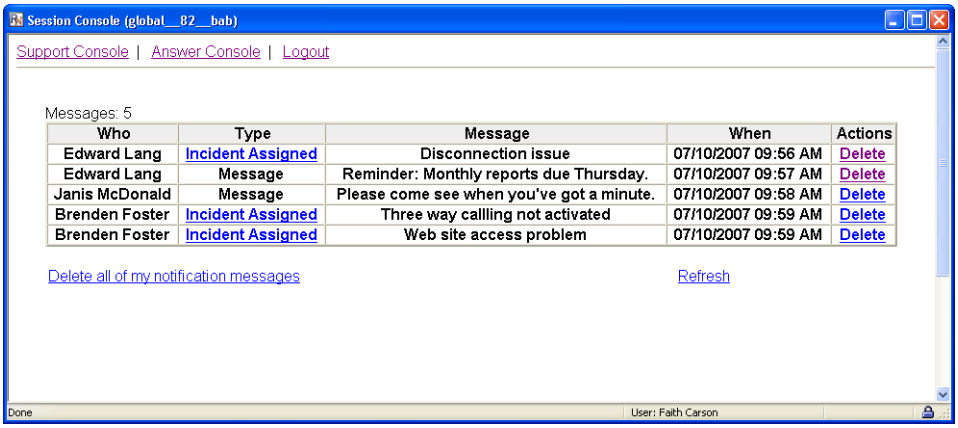

Session Console (global__82__bab)
Support Console | Answer Console | Logout
Messages: 5
Who | Type | Message | When | Actions
Edward Lang | Incident Assigned | Disconnection issue | 07/10/2007 09:56 AM | Delete
Edward Lang | Message | Reminder: Monthly reports due Thursday. | 07/10/2007 09:57 AM | Delete
Janis McDonald | Message | Please come see when you've got a minute. | 07/10/2007 09:58 AM | Delete
Brenden Foster | Incident Assigned | Three way callling not activated | 07/10/2007 09:59 AM | Delete
Brenden Foster | Incident Assigned | Web site access problem | 07/10/2007 09:59 AM | Delete
Delete all of my notification messages
Refresh
Done
User: Faith Carson

Figure 193: Session Console

Table 59 describes the Session Console functionality on the accessibility interface.

Table 59: Session Console Description

Function	Description
Support Console (Alt+s)	Click Support Console (or press **Alt+s,** then **Enter**) to open the Support Console. The Support Console is used to manage incidents, organizations, and contacts. For an overview of the Support Console, refer to "Working on the Support Console" on page 308. For additional information about working with incidents, refer to Chapter 2, "Incidents," on page 15.
Answer Console (Alt+a)	Click Answer Console (or press **Alt+a,** then **Enter**) to open the Answer Console. The Answer Console is used to manage the answers published on your web site. For an overview of the Answer Console, refer to "Working on the Answer Console" on page 323. For additional information about working with answers, refer to Chapter 3, "Answers," on page 79.
Logout (Alt+x)	Click Logout (or press **Alt+x,** then **Enter**) to log out of RightNow Service.
Messages	This section displays messages and incident and answer notifications. Details about each message include who sent it, the type of notification, the subject of the message, and the date and time it was sent. To open a message's incident or answer in a separate window for editing, select it in the Type column and press **Enter.**
Delete all of my notification messages (Alt+d)	Click Delete All My Notification Messages (or press **Alt+d,** then **Enter**) to delete all messages. **Note:** Click Delete next to an individual message to delete only that notification. Click the OK button to confirm.
Refresh (Alt+r)	Click Refresh (or press **Alt+r,** then **Enter**) to refresh the list of messages.

Working on the Support Console

From the Support Console, you can add and edit incidents, organizations, and contacts. You can also search for incidents, organizations, and contacts and forward incidents to other staff members. This section describes how to work with incidents on the accessibility interface. For a full discussion about working with incidents in RightNow Service, including functionality that is not available on the accessibility interface, refer to Chapter 2, "Incidents," on page 15.

The Support Console is shown in Figure 194.

Path: Session Console>Alt+s>Enter

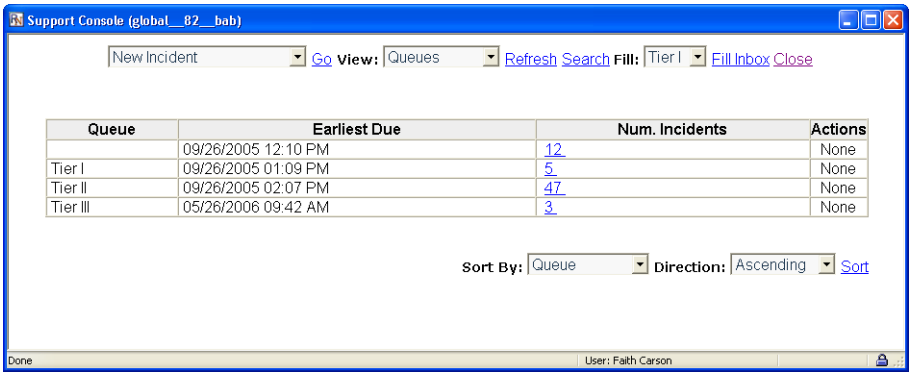


Figure 194: Support Console

Your navigation set determines which report opens by default, but you can click the View drop-down menu and make other selections. Table 60 describes the functions you can perform on the Support Console. The rest of this section describes the procedures for adding incidents, organizations, and contacts.

Table 60: Support Console Description

Function	Description
New Incident	Click this drop-down menu to select New Incident or New Organization/Contact. Then click Go (or press **Alt+g,** then **Enter**) to add an incident or organization and contact.

Table 60: Support Console Description (Continued)

Function	Description
View	Click this drop-down menu and select the report you want to display on the Support Console. The available selections depend on your staff profile defaults and permissions, which include navigation sets and reports.
Refresh (Alt+r)	Click Refresh (or press **Alt+r,** then **Enter**) to refresh the information displayed on the Support Console. Any new incidents assigned to you are added to the display, and any deleted incidents are removed.
Search (Alt+s)	Click Search (or press **Alt+s,** then **Enter**) to search for an incident. The search filters depend on the selected report.
Fill Inbox (Alt+f)	Click the Fill drop-down menu, select a queue to pull incidents from, and click Fill Inbox (or press **Alt+f,** then **Enter**).
Close (Alt+x)	Click Close (or press **Alt+x,** then **Enter**) to close the Support Console.
Sort By	Click this drop-down menu to select a field for sorting the list of incidents.
Direction	Click this drop-down menu and select Ascending or Descending to define the order of the incidents.
Sort (Alt+o)	Click Sort (or press **Alt+o,** then **Enter**) to refresh the list of incidents based on your Sort By and Direction selections.

To add or edit an incident:

1 To add an incident, click Go (or press **Alt+g,** then **Enter**) next to the New Incident drop-down menu. The New Incident window opens.

Or

To edit an incident, click the incident in the Subject column. (You can also click Go after selecting Edit Incident from the drop-down menu in the incident's Actions column.) The Incident Edit window opens.

Note Figure 195 displays a new incident. If you are editing an existing incident, the top menu that includes Incident Messages, Incident Information, and Incident Details also includes a Print option. To print an incident, click Print to display the incident in a separate window; then click File and select Print.

Path: New Incident>Go

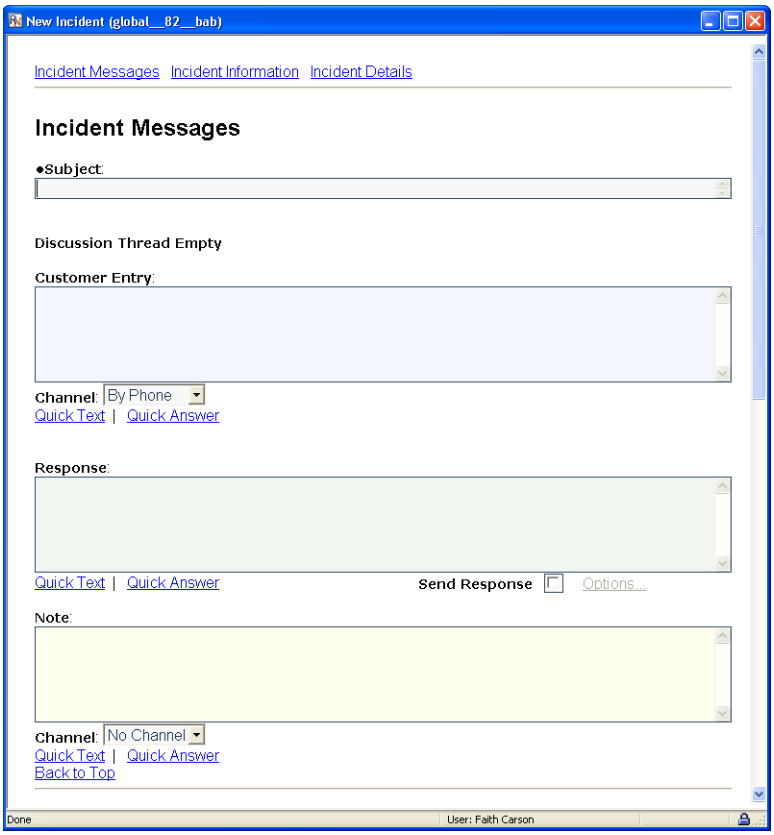


Figure 195: Incident Messages on the New Incident Window

2 Enter field information described in Table 61.

Table 61: Incident Messages Fields Description

Field	Description
***Subject**	If the customer originated the incident, this field contains the customer's summary of the question. If you need to change it, or if you are adding an incident, type a subject in the field.
Customer Entry	If the customer originated the incident, this field contains the customer's question. If you are adding an incident, type the customer's question in this field.
Channel	Click this drop-down menu and select the channel for the customer entry. The default selection is By Phone, and the other options include No Channel, By Fax, and By Post.
Response	Type your response to the customer in this field.
Note	Type text in this field to add information you want to provide only to other staff members. The information in this field cannot be seen by customers.
Channel	Click this drop-down menu and select the channel for the note. The default selection is No Channel, and the other options include By Phone, By Fax, and By Post.

3 To add standard text to your response, click Quick Text or press **Alt+k**, then **Enter.** The Quick Text window opens.

Path: Quick Text

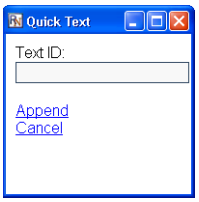


Figure 196: Adding Standard Text to a Response

a Type the Text ID for the standard text you want to add.
b Click Append to add the text to your response.

4 To add an answer to your response, click Quick Answer (or press **Alt+q,** then **Enter**). The Quick Answer window opens.

Path: Quick Answer

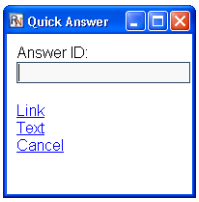


Figure 197: Adding an Answer to a Response

a Type the Answer ID for the answer you want to add.
b To add a link to the answer in your response, click Link.
c To add the text of the answer in your response, click Text.

5 To send a response to the contact when you save the incident, click the Send Response check box (or press **Alt+r**).

6 To specify options for sending the response, click Options (or press **Alt+t,** then **Enter**).

Path: Send Response>Options

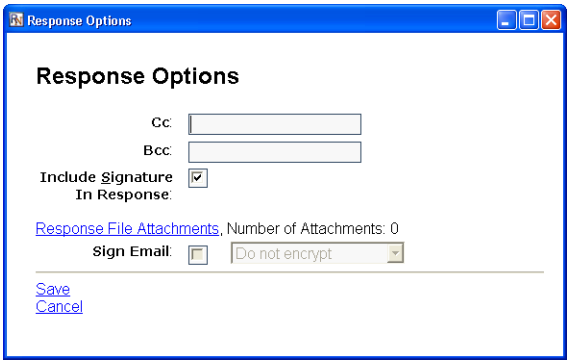


Figure 198: Response Options Window

a To send a copy of the response to other recipients, type their email addresses in the Cc or Bcc fields.

b To include or remove your signature from the response, select or clear the Include Signature in Response check box.

c To attach files to the incident, click Response File Attachments. The File Attachments window opens to let you browse for and select files.

d To sign the response with the mailbox's S/MIME certificate, select the Sign Email check box.

Note The Sign Email check box is disabled if the RightNow Service mailbox does not have a certificate that allows sending encrypted email.

---

e To encrypt your response to the contact, click the Do Not Encrypt drop-down menu and select Encrypt When Possible or Encrypt Always.

Note Selecting Encrypt Always for a contact that does not have a certificate to receive encrypted email results in a warning message when you select Save; you must then change either the email address of the contact or the encryption option.

---

f Click Save (or press **Alt+s**, then **Enter**) to close the Response Options window.

7 Continue to scroll down to add, edit, or view additional incident information.

Or

Click Incident Information (or press **Alt+2**, then **Enter**) at the top of the window.

Path: Incident Information

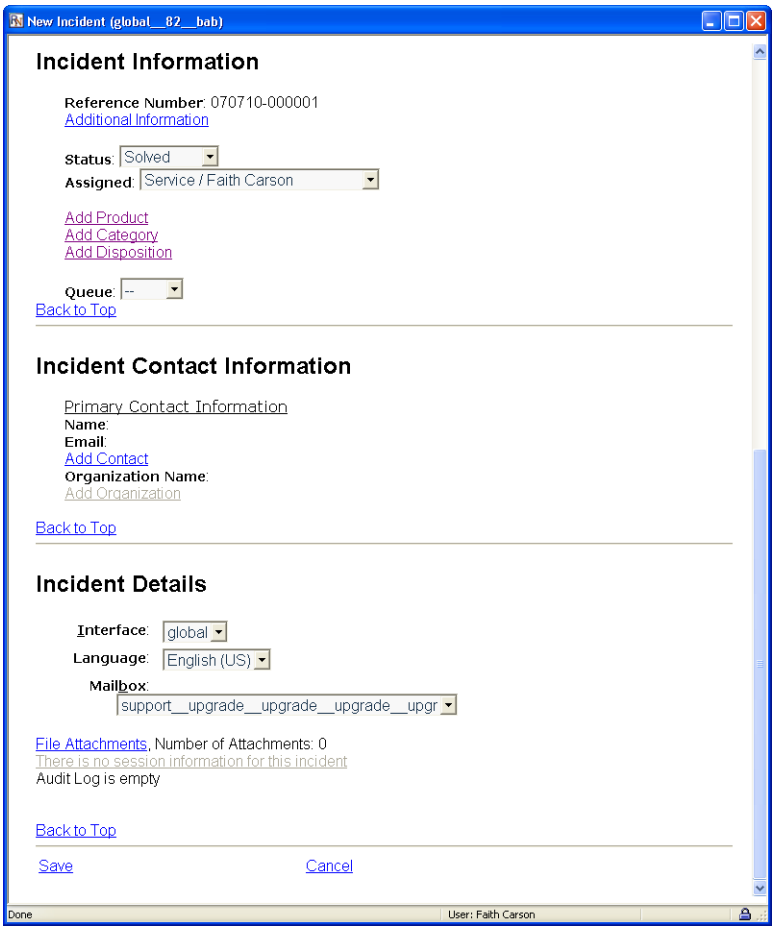


Figure 199: Incident Information on the New Incident Window

Table 62 describes the incident information fields.

Table 62: Incident Information Fields Description

Function	Description
Incident Information	The Incident Information section of the New Incident window contains the following information and fields.

Table 62: Incident Information Fields Description (Continued)

Function	Description
Reference Number	This read-only field contains the incident's reference number.
Additional Information (Alt+i)	Click Additional Information (or press **Alt+i,** then **Enter**) to display the date and time the incident was created, last updated, first responded to, last responded to, due, and closed. The Additional Incident Information window also displays who created the incident, whether it is in any rule state or escalation level, and the record ID. Click Close (or press **Alt+x,** then **Enter**) to close the window.
Status	Click this drop-down menu and select an incident status.
Assigned	By default, you are assigned to the incident if it is new. Click this drop-down menu to select another staff member to assign the incident to.
Add Product or View/Edit Product (Alt+p)	Click Add Product when adding incidents or View/Edit Product when editing incidents (or press **Alt+p,** then **Enter**) and select a product for the incident from the Product Hierarchy window. **Note:** The parent of the product you select is also selected automatically.
Add Category or View/Edit Category (Alt+a)	Click Add Category when adding incidents or View/Edit Category when editing incidents (or press **Alt+a,** then **Enter**) and select a category for the incident from the Category Hierarchy window.
Add Disposition or View/Edit Dispositions (Alt+d)	Click Add Disposition when adding incidents or View/Edit Disposition when editing incidents (or press **Alt+d,** then **Enter**) and select a disposition for the incident from the Disposition Hierarchy window.
Queue	Click this drop-down menu and select an incident queue.
Incident Contact Information	The Incident Contact Information section of the window contains the following information and fields.
Primary Contact Information	This read-only field contains the contact's name and email address.
Add Contact or View/Edit Contact (Alt+c)	Click Add Contact when adding an incident or View/Edit Contact when editing an incident (or press **Alt+c,** then **Enter**) to add or edit contact information.

Table 62: Incident Information Fields Description (Continued)

Function	Description
Add Organization or View/Edit Organization (Alt+o)	Click Add Organization when adding an incident or View/Edit Organization when editing an incident (or press **Alt+o**, then **Enter**) to add or edit organization information.
Incident Details	The Incident Details section of the window contains the following information and fields.
Interface	Click this drop-down menu and select an interface for the incident.
Language	Click this drop-down menu and select a language for the incident.
Mailbox	Click this drop-down menu and select a mailbox.
File Attachments (Alt+m)	Click File Attachments (or press **Alt+m,** then **Enter**) to add file attachments to the incident.
Session Information (Alt+e)	Click Session Information (or press **Alt+e,** then **Enter**) to display the Session History window, which lists the pages the customer accessed on the end-user interface before submitting the incident. **Note:** This option is not available when you are adding an incident.
Audit Log (Alt+l)	Click Audit Log (or press **Alt+l,** then **Enter**) to display a list of all the actions taken on the incident. **Note:** The audit log is empty when you first add an incident.
Incident Custom Fields	If your RightNow administrator has added incident custom fields, they appear at the bottom of this page; a link also appears at the top of the page. Complete the custom fields by selecting a date, typing text, or selecting a menu option or radio button.

8 To forward the incident, click Forward (or press **Alt+f,** then **Enter**) to open the Forward Incident window. Complete the fields to forward the incident to the specified email addresses. If the mailbox does not have an S/MIME certificate, the Sign Email check box is disabled; only staff account email addresses are checked for encryption options when forwarding an incident.

Note You can forward only incidents that you are editing. The Forward option is not available when adding incidents.

9 Click Save (or press **Alt+s,** then **Enter**) to save the incident.

To add an organization and contact:

1 Click the New Incident drop-down menu and select New Organization/Contact.

2 Click Go (or press **Alt+g,** then **Enter**). The New Organization window opens.

Path: New Organization/Contact>Go

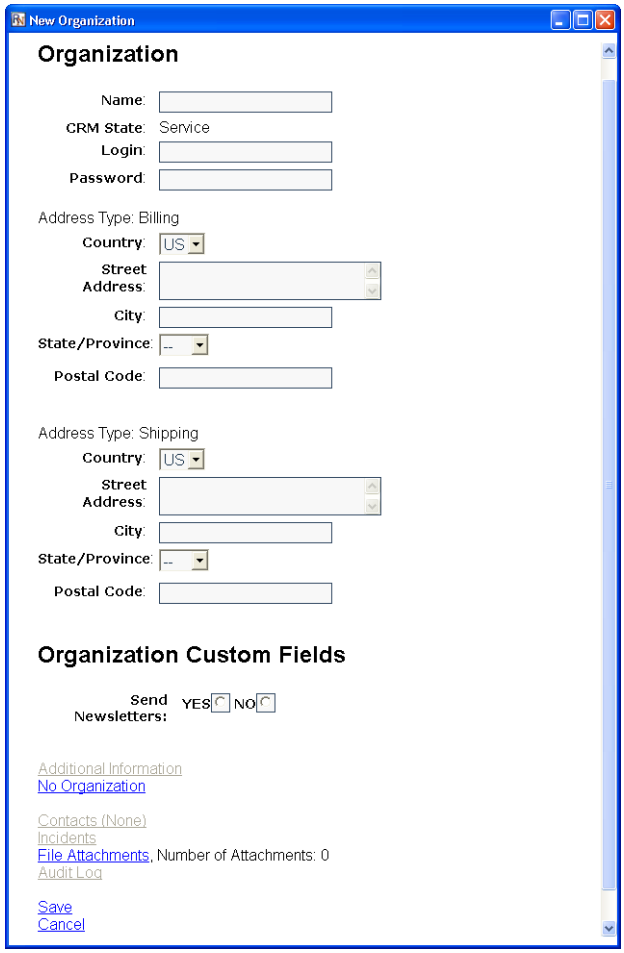


Figure 200: Adding an Organization

3 Enter field information described in Table 63.

Table 63: New Organization Window Description

Field	Description
Name	Type a name for the organization in this field.
CRM State	This read-only field indicates the organization's CRM state.
Login	Type an optional login name for the organization.
Password	Type an optional password for the organization.
Billing Address	Enter the following information pertaining to the organization's billing address.
Country	Click this drop-down menu and select a country.
Street Address	Type the street address in this field.
City	Type the city in this field.
State/Province	Click this drop-down menu and select a state or province from those associated with the selected country.
Postal Code	Type the postal code in this field.
Other Address Types	If additional organization address types have been defined by your RightNow administrator, add the information here.
Organization Custom Fields	If your RightNow administrator has added organization custom fields, they appear on this page. Complete the custom fields by selecting a date, typing text, or selecting a menu option or radio button.
Additional Information (Alt+i)	Click Additional Information (or press **Alt+i,** then **Enter**) to display organization information, including the date it was created, the date it was updated, its rules state, and record ID.
No Organization (Alt+o)	Click No Organization (or press **Alt+o,** then **Enter**) to add No Organization to the Name field. When you click Save, the New Contact window opens; the contact you add does not have an organization association.

Table 63: New Organization Window Description (Continued)

Field	Description
Contacts	Click Contacts to view the contacts associated with the organization you are editing. **Note:** This option is disabled if you have not yet finished adding an organization.
Incidents	Click Incidents to view the incidents associated with the organization you are editing. **Note:** This option is disabled if you have not yet finished adding an organization.
File Attachments	Click File Attachments to add file attachments to the organization.
Audit Log	Click Audit Log to view the actions taken on the organization you are editing. **Note:** This option is disabled if you have not yet finished adding an organization.

4 Click Save (or press **Alt+s,** then **Enter**) to save the organization information. The New Contact window opens.

Note The contact you add to the New Contact window is automatically associated with the organization you just saved.

Path: New Organization/Contact>Go>Enter Organization Information>Save

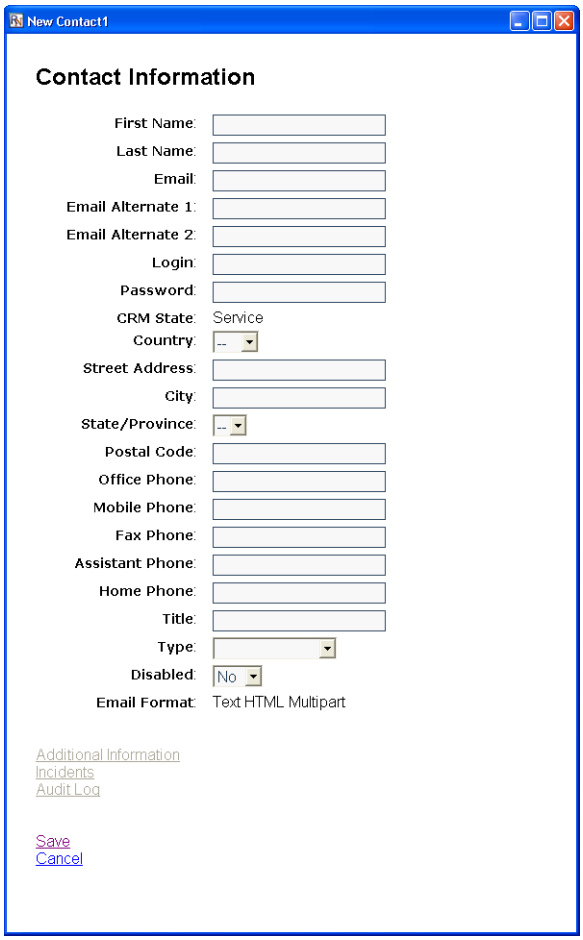


Figure 201: Adding a Contact

5 Enter the following contact information.

- First Name
- Last Name
- Email
- Email Alternate 1
- Email Alternate 2
- Login

- Password
- CRM State (read-only)
- Country
- Street Address
- City
- State/Province
- Postal Code
- Office Phone
- Mobile Phone
- Fax Phone
- Assistant Phone
- Home Phone
- Title
- Type
- Disabled
- Email Format (read-only)
- Contact Custom Fields (if defined)

6 Click Save (or press **Alt+s,** then **Enter**) to save the contact and associate it with the organization you added. The message "Organization/Contact Created" is displayed.

7 Click the OK button to confirm the creation of the organization and contact, close the message, and return to the Support Console.

The information in Table 64 describes additional options for editing an existing contact; these options are disabled if you have not yet finished adding a contact.

Table 64: Edit Contact Information Options Description

Option	Description
Additional Information (Alt+i)	Click Additional Information (or press **Alt+i,** then **Enter**) to open a window displaying contact information, including the date it was created, the date it was updated, its rules state, and record ID.
Incidents	Click Incidents to view the incidents associated with the contact.
Audit Log	Click Audit Log to view the actions taken on the contact.

To add secondary contacts to an organization:

1 Click the View drop-down menu and select an Organizations report. The list of organizations is displayed on the Support Console.

2 Click the drop-down menu in the Actions column of the organization you want to add the contact to and select Add Contact.

3 Click Go in the right column of the row containing the organization. The New Contact window opens.

4 Enter and save contact information as described in "To add an organization and contact:" on page 317.

To edit a contact:

1 Click the View drop-down menu, and select a report containing contact records. The list of contacts is displayed on the Support Console.

2 Click the last name of the contact record you want to edit. The record opens.

3 Make any changes to the contact.

4 To print the contact record, click Print at the top of the window. The contact opens in a separate window, where you can click File and select Print to print the contact.

5 Click Save (or press **Alt+s,** then **Enter**) to save your changes to the contact record.

For more information about working with contacts and organizations, refer to the *RightNow 8.2 User Manual.*

Working on the Answer Console

From the Answer Console, you can add and edit answers. You can also search for answers using selection criteria, attach files to answers, and add products and categories to groups of related answers. This section describes how to work with answers on the accessibility interface. For a full discussion about working with answers in RightNow Service, including functionality that is not available on the accessibility interface, refer to Chapter 3, "Answers," on page 79.

The Answer Console is shown in Figure 202.

Path: Session Console>Alt+a>Enter

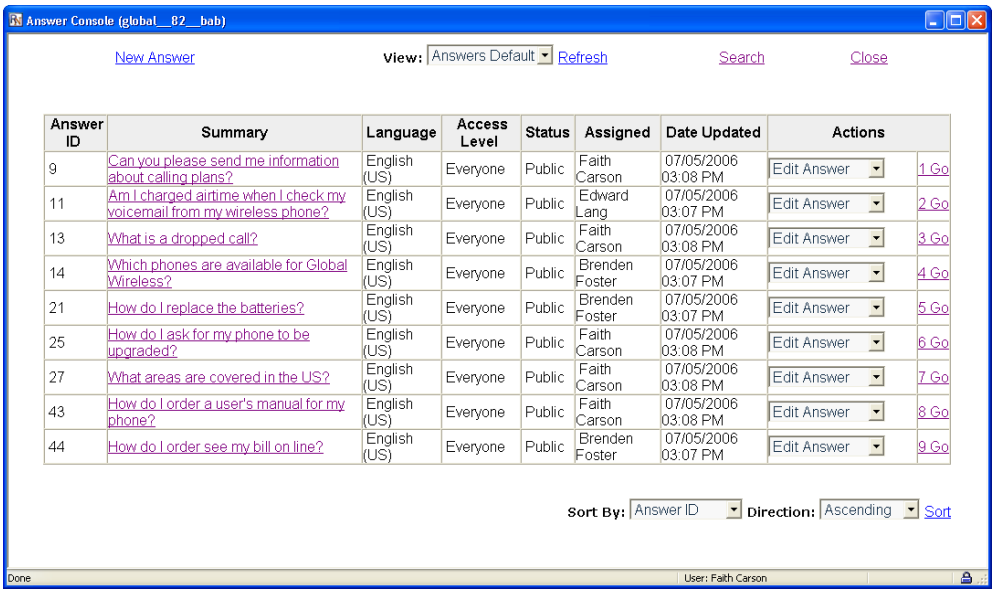

Answer Console (global__82__bab)
New Answer
View: Answers Default
Refresh
Search
Close
Answer ID | Summary | Language | Access Level | Status | Assigned | Date Updated | Actions
9 | Can you please send me information about calling plans? | English (US) | Everyone | Public | Faith Carson | 07/05/2006 03:08 PM | Edit Answer | 1 Go
11 | Am I charged airtime when I check my voicemail from my wireless phone? | English (US) | Everyone | Public | Edward Lang | 07/05/2006 03:07 PM | Edit Answer | 2 Go
13 | What is a dropped call? | English (US) | Everyone | Public | Faith Carson | 07/05/2006 03:08 PM | Edit Answer | 3 Go
14 | Which phones are available for Global Wireless? | English (US) | Everyone | Public | Brenden Foster | 07/05/2006 03:07 PM | Edit Answer | 4 Go
21 | How do I replace the batteries? | English (US) | Everyone | Public | Brenden Foster | 07/05/2006 03:07 PM | Edit Answer | 5 Go
25 | How do I ask for my phone to be upgraded? | English (US) | Everyone | Public | Faith Carson | 07/05/2006 03:08 PM | Edit Answer | 6 Go
27 | What areas are covered in the US? | English (US) | Everyone | Public | Faith Carson | 07/05/2006 03:08 PM | Edit Answer | 7 Go
43 | How do I order a user's manual for my phone? | English (US) | Everyone | Public | Faith Carson | 07/05/2006 03:08 PM | Edit Answer | 8 Go
44 | How do I order see my bill on line? | English (US) | Everyone | Public | Brenden Foster | 07/05/2006 03:07 PM | Edit Answer | 9 Go
Sort By: Answer ID
Direction: Ascending
Sort
Done
User: Faith Carson

Figure 202: Answer Console on the Accessibility Interface

Table 65 describes the functions you can perform on the Answer Console. The rest of this section describes the procedures for adding and editing answers.

Table 65: Answer Console Description

Function	Description
New Answer (Alt+n)	Click New Answer (or press **Alt+n,** then **Enter**) to add an answer.
View	Click this drop-down menu and select the report you want to display on the Answer Console. The available selections depend on your staff profile defaults and permissions, which include navigation sets and reports.
Refresh (Alt+r)	Click Refresh (or press **Alt+r,** then **Enter**) to refresh the information displayed on the Answer Console.
Search (Alt+s)	Click Search (or press **Alt+s,** then **Enter**) to search for an answer based on its language, access level, status, assigned staff person, Answer ID, and text.
Close (Alt+x)	Click Close (or press **Alt+x,** then **Enter**) to close the Answer Console.
Sort By	Click this drop-down menu to select a field for sorting the list of answers.
Direction	Click this drop-down menu and select Ascending or Descending to define the order of the answers.
Sort (Alt+o)	Click Sort (or press **Alt+o,** then **Enter**) to refresh the list of answers based on your Sort By and Direction selections.

To add or edit an answer:

1 To add an answer, click New Answer (or press **Alt+n,** then **Enter**). The New Answer window opens.

Or

To edit an answer, click the answer in the Summary column. (You can also click Go after selecting Edit Answer from the drop-down menu in the answer's Actions column.) The Edit Answer window opens.

Note Figure 203 displays a new answer. If you are editing an existing answer, the top menu that includes Answer Information, Answer Details, and Meta-Answer also includes a Print option. To print an answer, click Print to display the answer in a separate window; then click File and select Print.

Path: New Answer

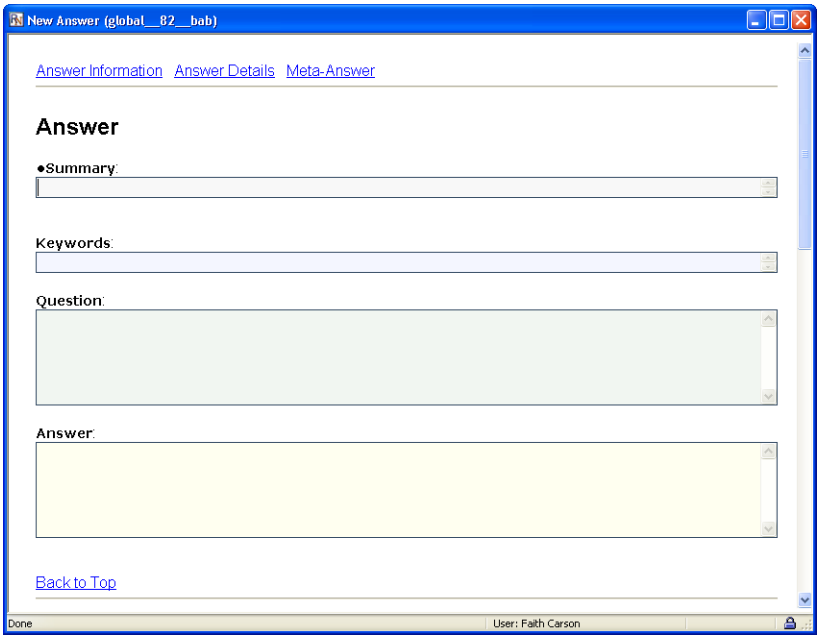


Figure 203: Adding an Answer

2 Enter field information described in Table 66.

Table 66: New Answer Window Description

Field	Description
***Summary**	Type a summary that can serve as the subject of the answer in this field.

Table 66: New Answer Window Description (Continued)

Field	Description
Keywords	Type any keywords or key terms (multi-word phrases) you want associated with the answer. Separate the keywords and key terms with commas.
Question	Type a question.
Answer	Type the answer to the question.

3 Click Answer Information at the top of the window (or press **Alt+1**, then **Enter**) to access additional answer fields and add, edit, or view additional answer information.

Path: Answer Information

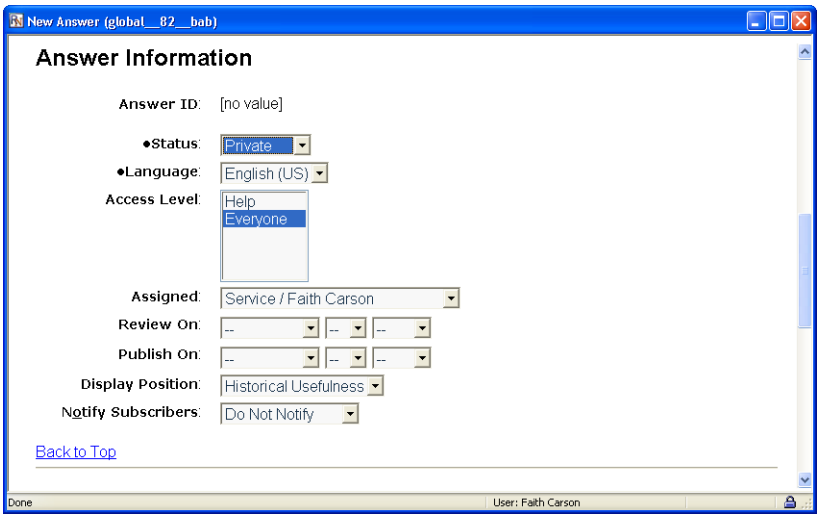


Figure 204: Completing Answer Information

Table 67 describes the answer fields.

Table 67: Answer Information Fields Description

Field	Description
Answer ID	If you are working on an existing answer, the Answer ID field is a read-only field that contains the ID number of the answer. **Note:** New answers are not assigned an Answer ID until they are saved.
***Status**	Click this drop-down menu and select an answer status.
***Language**	Click this drop-down menu and select a language.
Access Level	Select Help or Everyone from the menu to define the answer's access level.
Assigned	By default, you are assigned to the answer if it is new. Click this drop-down menu to select another staff member to assign the answer to.
Review On	Click the left drop-down menu and select a month. Click the center drop-down menu and select a date, and click the right drop-down menu to select a year. This is the date you want the answer to be set to Review status.
Publish On	Click the left drop-down menu and select a month. Click the center drop-down menu and select a date, and click the right drop-down menu to select a year. This is the date you want the answer to be set to Public status.
Display Position	Click this drop-down menu and select a display position. The choices include the answer's historical usefulness based on customer feedback; placing the answer at the top, middle, or bottom of the answer list; or permanently fixing the answer's position at the top, middle, or bottom.
Notify Subscribers	Click this drop-down menu and select an option for notifying subscribers that this answer has been added or updated. The options include no notification, notifying this hour, and notifying at the end of the day, week, or month.

4 Click Back to Top and select Answer Details.

Or

Scroll down to view the Answer Details and Meta-Answer information.

Path: Answer Details

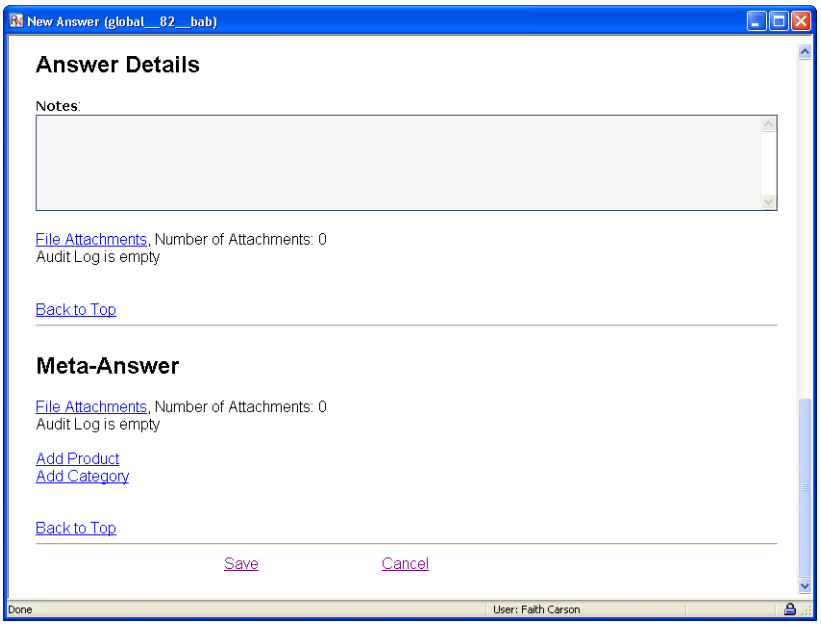


Figure 205: Adding Answer Details and Meta-Answer Information

5 To add notes about the answer, type your comments in the Notes field.

6 To view or add file attachments for the answer, click File Attachments (or press **Alt+f,** then **Enter**).

7 To view the audit log for the answer, click Answer Audit Log.

8 To view or add file attachments for the meta-answer, click File Attachments under Meta-Answer (or press **Alt+i,** then **Enter**).

Note Meta-answers are collections of answers all having the same products and categories. This "sibling answer" relationship is defined on the RightNow Console, not on the accessibility interface; however, you can attach files to meta-answers and edit meta-answer products and categories on the accessibility interface.

9 To associate one or more products with the meta-answer, click Add Product (or press **Alt+p,** then **Enter**). The Product Hierarchy window opens. Select the products you want to associate and click Save (or press **Alt+s,** then **Enter**) to close the window.

10 To associate one or more categories with the meta-answer, click Add Category (or press **Alt+c,** then **Enter**). The Category Hierarchy window opens. Select the categories you want to associate and click Save (or press **Alt+s,** then **Enter**) to close the window.

11 Click Save (or press **Alt+s,** then **Enter**) to save the answer.

Appendix A
SmartSense Emotive Rating

RightNow's SmartSense can help you assess the emotional state or attitude of customers and staff members in incidents or RightNow Live chat sessions. You can use SmartSense to determine which customers need immediate attention and when to notify supervisors or other staff members about specific incidents or situations. The emotive rating can also be used as a condition in business rules.

How SmartSense works

Two SmartSense ratings are available: one for the customer and one for the staff member editing the incident. SmartSense scans each incident and rates the words and phrases in all customer entries for the customer rating and all responses for the staff member rating.

Note SmartSense recognizes modifiers and negatives in all supported languages as well as some emoticons and acronyms. The SmartSense rating may be exaggerated if emotive words are set in all capital letters or the sentence contains an exclamation point.

When your RightNow administrator has added Contact SmartSense, Staff SmartSense, or both to the workspace you use for working on incidents, you will see the colored meter on the workspace. Figure 206 shows an incident workspace with both SmartSense meters displayed; the workspace you use for incidents depends on your profile and how your RightNow administrator configured incident workspaces.

Note The SmartSense meter also appears in RightNow Live if it has been enabled by your RightNow administrator.

Path: New>Incident

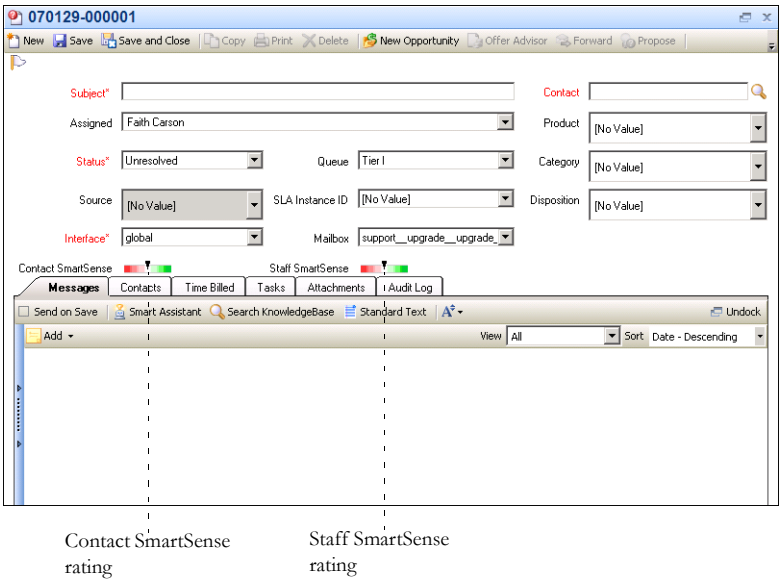


Figure 206: SmartSense Meters on an Incident Workspace

On a new incident such as the one shown in Figure 206, both meters start off at neutral, represented by the white center of the meter. Each time the incident is updated by the customer or edited by a staff member, the rating is re-indexed, with the current thread being weighted more heavily than previous threads.

The farther to the left (the red zone of the meter), the more negative the rating, while ratings toward the right, or green zone, are more positive.

Only response threads are considered for the Staff SmartSense rating; note threads are not evaluated. Additionally, SmartSense processes only the first 4,000 words in each incident thread rather than the entire thread, helping to make emotive indexing process faster for incident threads with a large number of words.

How to evaluate SmartSense ratings

While SmartSense is an effective tool for assessing a customer's general attitude, it may not always provide a completely accurate rating. For example, if a word has several meanings, the SmartSense rating may not be exactly precise for one or more of the meanings. Also, if a word is not in the SmartSense list, it will not be considered, and sentences containing complex negation or qualification could be misinterpreted by SmartSense.

As a single rating, the SmartSense rating may be an oversimplification. If a customer writes both positive and negative remarks in an incident (for example, is pleased with the product but expresses anger or frustration about a support issue), the emotive rating may result in a neutral value, since the extreme words will balance each other. Despite these potential difficulties, SmartSense gives a useful overall estimate of emotional levels and can help you provide superior service to your customers.

Note While the SmartSense word list is proprietary and cannot be viewed, your RightNow administrator can specify word ratings that extend or override those used by SmartSense. This allows custom values for words that have specific meanings for a particular organization or industry.

Your RightNow administrator can also disable SmartSense. If disabled, the SmartSense evaluations are not performed, the ratings are not displayed on the incident workspace or during chat sessions, and the emotive rating options are not available when choosing conditions for business rules.

RightNow Glossary

Absolute time—An exact date and time defined in an escalation action for business rules or a comparison period for custom reports. In standard reports, absolute time is the amount of time passed based on a 24-hour clock.
See also Relative time.

Access level conditional section—A method of controlling the visibility of a portion of an answer. Only those staff members and customers with permission to view the access level assigned to the answer section can view it.

Accessibility interface—A non-graphical interface in RightNow Service that allows staff members to work on the administration interface and customers to use the end-user interface. All mouse functionality is accomplished with keystrokes to make navigation simple and fast. The accessibility interface complies with Section 508 of the Rehabilitation Act.

Action—The part of a business rule that defines what happens when an object (answer, contact, incident, Live session, opportunity, organization, target, or task) meets the rule's conditions. Rules can contain multiple actions. An action is also a component of a campaign. Actions can perform one of nine functions in a campaign, including sending broadcast and transactional mailings, executing external events, adding contacts to lists, and notifying staff members.

Action arrow—An arrow on a workspace field or control that displays available editing options.

Activate—A process that is manually run after making changes to a state, function, or rule in a rule base to check for errors, archive the current rule base, and convert the edited rule base to the active rule base.
See Business rules *and* Rule base.

Active—One of seven default opportunity statuses and status types. An opportunity with the Active status is currently advancing in the system toward a sale.

Administration buttons—The buttons on the navigation pane of the Administration Console associated with RightNow's administration options: Common, Service, Marketing, and Sales. Clicking a button displays that option's list of administration items.

Administration Console—The console for configuring and customizing all areas in RightNow.

Administration interface—The graphical user interface that staff members use to configure, manage, and work with all elements of a RightNow application.

Administrator—A staff member who configures, customizes, and maintains a RightNow application.

Administrator login—The default login used by the RightNow administrator to log in the first time after downloading RightNow. This special login is not a defined staff account and has no profile associated with it. After logging in with the administrator login, a profile with full access and edit permissions must be created, and a staff account with that profile must be added.

Advanced mode—A workspace editing mode that includes controls for panels, tab sets, and tables, which are not present in the basic mode.

Advanced mode also allows the definition of additional properties for fields and controls on the workspace.

agedatabase—A scheduled utility that operates on the knowledge base data to maintain dynamic answers and make searching more efficient for staff members and customers.

Agent—A staff member in RightNow Service who may be assigned incidents and Live chats with customers, and who may also maintain contact and organization records.

Agent applet—The RightNow Live agent interface where agents chat with customers and manage their chat sessions. The agent applet is divided into sections containing agent, user wait queue, responses and URLs, system statistics, and customer chat information. The amount of information displayed depends on the Live permissions set in an agent's profile. Also called *Chat Home*.

Agent mode—The availability status of an agent using CTI in RightNow. Agent modes are determined by the phone switch. The default modes can be edited and renamed, and custom CTI agent modes can be added.
See CTI.

Aging—An automatic process that reduces an answer's solved count as the frequency with which the answer is viewed by customers declines. As the solved count is lowered, the answer will move down the list of answers and be less visible to customers.

Alias—A word that represents another word or phrase. Aliases and the words or phrases they represent can be added to the synonym list to enhance customer searching.
See Wordlist file.

Anchor—A node on an action or decision in a campaign used to create a path. Actions and decisions have anchors for incoming and outgoing paths. Anchor also refers to a destination for hyperlinks placed at locations within documents for use in mailings and questionnaires for surveys.

Announcements box—A white board or memo box on the Support Home and My Overview pages on the end-user interface for displaying information to customers, such as upcoming product releases or marketing information. Announcement boxes can be enabled or disabled, and the text can be customized.

Answer—Any knowledge base information that provides solutions to common customer support questions.

Answer access level—A method of controlling what information is visible to staff members and customers. The default answer access levels are Help and Everyone, and custom access levels can be added.

Answer custom field—A field for gathering and displaying additional information about answers. Answer custom fields appear when adding or editing an answer and on the Find Answers and Answer pages.

Answer relationship—The relationship between two or more related answers. Answer relationship types include sibling, manually related, and learned link. Sibling and manually related answer relationships are defined by staff members; learned link answers are automatically defined through customer activity.

Answer status—A method of controlling the visibility of an answer. The default answer statuses are Public, Private, Proposed, and Review, and custom answer statuses can be added.

Answer status type—The status of an answer that determines whether it can be viewed by customers. The default answer status types are Public and Private.

Answer type—The format in which answers display to customers on the end-user interface. Answer types include HTML, URL, and file attachment.
See File attachment answer, HTML answer, *and* URL answer.

Answer update notification—A way for customers to sign up to be notified whenever a particular answer is updated. Customers can also sign up for notification whenever any answer associated with a specific product or category is updated.

Answer variable—A shortcut for defining a larger string in the body of an answer. When the variable is inserted in the body of the answer, it is replaced with the value specified in the variable.

API (application program interface)—An interface that allows programmers the ability to communicate with the RightNow database. The API includes functionality to create, update, delete, and retrieve answers, contacts, hierarchical menus, incidents, opportunities, organizations, quotes, SLA instances, staff accounts, and tasks.

Ask a Question—A link on the Support Home page that customers can click to submit a question when they cannot find an answer in the knowledge base. This component of RightNow Service is restricted and requires a customer account.
See Customer account.

AT command—A Windows command used to schedule when processes, including utilities, are automatically run.

Audience—All of the contacts belonging to the lists and segments associated with a mailing or survey.
See also Contact list *and* Segment.

Audit log—A list of all the actions taken on a record in the knowledge base, including who performed the action, what the action was, and when the action was taken.

Auto filter—A control added to report columns used to filter report data by values in the columns.

Automatic call distribution (ACD)—A telephone switch that routes incoming telephone calls, assigning them to individual extensions based on the dialed number and a set of handling rules.

Automatic number identification (ANI)—A service that identifies the telephone number of the caller. This information can be used to identify customers in CTI.

Backup directory—The directory that contains all the backup files created by the File Manager.

Backup file—A file that is automatically saved each time a file is edited through the File Manager. Before the file is overwritten, the backup file is saved. The restore function can be used to revert to the backup file.

Basic File Manager—The default version of File Manager that provides access to the most commonly modified files, including the files used to modify the end-user interface, headers and footers of the email messages, images on the end-user interface and RightNow Live, wordlist files, and dictionary files.
See also File Manager *and* Expanded File Manager.

Billable task—A way of classifying and recording the amount of time agents spend working on incidents. The default billable task is Miscellaneous, and custom billable tasks can be added.

Block quotes—A symbol or HTML tag that designates a section of text that is not part of the most current email reply, such as previous entries in the email conversation.
See also Checksum *and* techmail.

Boolean searching—A knowledge base search that allows customers to connect multiple keywords using & (AND) and |(OR) operators.

Bounced email—Email that is undeliverable. Email can be bounced when email accounts are not functioning properly or are full at the time the mailing is sent. RightNow Marketing and RightNow Feedback track bounced emails.
See also Email management.

Broadcast mailing—A mailing sent to one or more contact lists or segments. Broadcast mailings can be sent at a scheduled time and used in a campaign.
See also Contact list *and* Segment.

Broadcast survey—A survey sent as a broadcast mailing in which the message, audience, and mailing options are defined in the survey.

Browse—A search method on the end-user interface in which answers are grouped based on keywords, products, categories, and noun phrases in the Summary and Question fields. Browse can be configured as single-level browse, which provides a guided search, or multi-level browse, which enables customers to view the topic clusters of the knowledge base to find their own answers.
See also Multi-level Browse *and* Single-level Browse.

bulkdel—A utility for deleting several incidents at once.

Business rules—A component in RightNow for defining processes to automate workflow, notification, and escalation. Business rules can automatically route incidents, opportunities, and chat sessions; send email and marketing messages; escalate answers, incidents, opportunities, and tasks; update records; assigns SLAs; and create Offer Advisor targets.

Cached data—Report data that has been temporarily stored in the database for quicker report generation. This data is cached nightly by the *agedatabase* utility and can be purged regularly.

Callback request—An option for customers to request a telephone call from a RightNow Live agent.

Campaign—A multiple-step marketing process based on business logic. Campaigns can contain any number of actions and decisions and move contacts through a series of steps when specified criteria have been met.

Canceled—A mailing and survey status that indicates a mailing or survey has been manually canceled before being completed.

Category—An option for grouping answers and incidents that allows more precise organization in the knowledge base. Staff members can classify answers and incidents by category and up to five additional levels of sub-categories, allowing more refined searching by customers and staff members.
See also Product.

Certificate—A digital piece of information for email and Internet security that includes the name of the certification authority, the holder of the certificate, the certificate holder's public key, the dates the certificate is valid, the serial number, and the digital signature of the certification authority. Certificates are also referred to as public certificates.

Certificate revocation list—A list of certificates that have been suspended or revoked before they have expired. The certification authority maintains, updates, and publishes the certificate revocation list at regular intervals.

Certification authority—A third party authorized to issue certificates and authenticate the identity of the holder of the certificate.

Channel—The source of an incoming incident (for example, email, Ask a Question, Live chat session, phone call, fax, or mail). Channels are also used to indicate the source of information for incident notes on the accessibility interface and contact, opportunity, and organization notes.

Chart style—A collection of display settings that can quickly be applied to charts used in reports. Chart styles control most of the graphical configuration of charts.

Chat Home—An item on the Communication Center navigation list for accessing the RightNow Live agent applet on the content pane.

Chat session—A real-time, two-way dialog between a customer and one or more RightNow Live agents.
See RightNow Live.

Chat session queue—A sequence of unassigned requests for chat sessions and callbacks. The default chat session queue is the RightNow Live Default Queue, and custom queues can be added. Requests are added to chat session queues automatically by business rules and are handled in a first-in, first-out manner.

Checksum—A calculated value that represents the content of a block of quoted text. This value is sent within the block quote tags of the email message and is used to determine if text has been added to the original message.
See also Block quotes *and* techmail.

Choice question—A question type that allows customers to choose their answer from a menu, radio button, check box, or list.

Client—The interface that displays on a customer's computer when submitting a request to chat with a RightNow Live agent. RightNow Live provides two clients: Java client (the default) and thin client. The client that will be loaded depends on the web browser used by the customer when requesting a chat and whether RightNow Live Collaboration is enabled.
See Java client *and* Thin client.

Clone—To create an exact copy of an existing interface.

Closed—One of seven default opportunity statuses and status types. An opportunity with the Closed status has resulted in a sale.

Clustering—An automatic process that groups the knowledge base into clusters of related answers and labels each cluster group with keywords that define those answers.
See also Data mining.

Collaboration—A feature in RightNow Live that enables agents to guide customers through web pages using the mouse pointer to demonstrate actions.

Color scheme—A collection of colors that can be applied to chart styles. Multiple colors can be defined and combined into one color scheme. Charts that use the same scheme use the same set of colors.

Comparison period—A reporting parameter used to compare a report's time period to an identical length of time in the past. Comparison periods are defined when creating or editing a custom report and can be included in standard reports.

Competitor—An option for identifying other parties pursuing the same opportunity.

Compile—A process that runs the compiler engine to check states, functions, and rules within a rule base to ensure there are no errors.
See Rule base *and* Activate.

Completed—A mailing and survey status that indicates a broadcast mailing or broadcast survey has been sent. The system automatically sets the status to Completed from the Sending status.

Complex expression—A search technique that enables customers and staff to search for a broader set of content. This technique allows wildcard searching using an asterisk (*) at the end of a word or partial word and a tilde (~) before a word to perform a similar phrases search on that word only. Word stemming and logical operators are also supported. This technique is available on the RightNow Console and the end-user interface in RightNow Service.
See also Word stemming *and* Logical operators.

Computed field— A column whose value is derived from calculations performed on database fields. Computed fields can be added to output levels in custom reports.

Condition—The part of a business rule that determines whether an answer, contact, incident, Live session, opportunity, organization, target, or task matches a business rule. Rules can contain multiple conditions.

Conditional section—A section of text in a document that appears only to those contacts meeting certain criteria.
See Document.

Conference—A feature in RightNow Live that enables an agent to conference another agent into a chat session with a customer.

Configuration Editor—The editor for customizing configuration settings.

Configuration settings—All of the settings accessed from the Configuration Editor to configure and customize a RightNow interface, including enabling and disabling features and RightNow products.

Configuration Wizard—An interactive utility for customizing and configuring RightNow. Configuration categories include Outgoing Email, Support Home, Answers, Ask a Question, My Stuff, Security, Incidents, Agedatabase Utility, and SmartAssistant Response.

Contact—Any individual with a contact record in the knowledge base. Contact records can be added by staff members and by customers when submitting a question.

Contact custom field—A field for gathering and displaying additional information about contacts. Contact custom fields appear when adding or editing a contact record and on the My Stuff and Live Assistance pages.

Contact list—A static or fixed group of contacts that is used to choose the contacts who receive a broadcast mailing or survey. Contacts can be added to lists.

Contact role—An option for classifying contacts by their roles in opportunities.

Contact type—An option for classifying contacts by types, such as job positions or decision-making roles.

Contact Upload—An interactive utility used for importing contact records into the RightNow database.

Contact upload template—A saved format used by the Contact Upload feature to map columns in a CSV file to columns in the RightNow database.
See Contact Upload.

Content Library—A component on the RightNow Console for creating content that can be used in mailings, web pages, and surveys. Content includes documents, tracked links, files, templates, and snippets.

Content pane—The area on the right side of both consoles where staff members work with administration items, reports, individual records, and explorers. On the Administration Console, the content pane displays the administration item's tree and editor or the item's explorer selected from the list of administration items. On the RightNow Console, the content pane displays a report (standard, custom, or list of records), an individual record, or explorer selected from a navigation list.

Content pane tabs—All the reports and items currently open on either console displayed in tabs on the bottom of the content pane. Staff members can click a tab to return to a report or item or right-click a tab and select from Open in New Window, Close, Close All But This, and Close All.

Context-sensitive answers—A subset of SmartAssistant that allows organizations to construct special Related Answer links from any web page to provide additional information to their customers.
See also Help access level.

Control—A tool for placing titles, spacers, reports, and other advanced features on a workspace.

Corner GIFs—Rounded images that make the corners of the tabs on the end-user interface. The color of the images can be updated to the current colors in the *enduser.css* by running the *imgupd* utility. *See* imgupd.

CRM state—*See* State.

crontab—A UNIX command used to schedule when processes, including utilities, are automatically run.

crontabfile—A UNIX file that contains and stores the scheduled processes.

Cross tab—A method of displaying report data in a table format.

CSV (comma-separated value)—A file format with commas separating one column value from the next. Each row is delineated by a carriage return. Also called *comma-delimited.*

CTI (computer telephony integration)—A data connection between telephone systems and computers.

CTI screen pop—A computer telephony integration function that causes information related to contacts, incidents, organizations, or opportunities to be opened on staff members' workstations when they answer a call.

Currency—A monetary denotation based on country of origin. Currencies can be defined for each country or province in which an organization does business.
See also Exchange rate.

Custom field—A field for gathering and displaying additional information about answers, contacts, incidents, opportunities, organizations, sales quotes, sales products, staff accounts, and tasks. Custom fields are added on the Administration Console and appear when adding and editing records; depending on the type and visibility, they may also appear on the end-user interface.

Custom report—A report that is created by copying and editing one of the standard reports in analytics and saving it as a new report, or by combining data from selected tables in RightNow

to create a new report. Custom reports can include customized output, data computation, and scheduling.

Customer—A contact or organization that has a service or purchase history in the RightNow knowledge base.

Customer account—Information consisting of a user ID and password that allows customers to access restricted functions on the end-user interface, including Ask a Question and My Stuff. Customers can create a customer account when submitting a question; this in turn adds a contact record in the knowledge base.

Customer Experience Designer—A tool used to build a graphical representation of a campaign. The Customer Experience Designer allows staff members to diagram the actions and decisions of a campaign on a canvas and define the attributes of each component.
See also Workflow diagram.

Dashboard—Any combination of individual reports shown together in one report. Dashboards enable staff members to search for and view a wide range of data from different reports without opening each report individually.

Data dictionary—A list of all the available tables and fields from the database that can be used in custom reports. Functions, output variables, and computed fields can also be selected from the data dictionary.

Data mining—The exploration and analysis of large quantities of data to discover meaningful patterns and rules. Data mining enables organizations to turn raw data into information they can use to gain a marketplace advantage.

Data set—The database tables and table joins that determine what data can be returned in a report. Data set also consists of the database columns a segment (dynamic list in RightNow Marketing) will have access to and what filters will be used to determine the final data set.

Data type—A set of data having predefined characteristics such as strings, integers, or dates. Each column in a database table is assigned a data type. Data type also refers to the type of custom field specified when adding staff account, organization, contact, sales products, incident, answer, opportunity, sales quotes, and tasks custom fields. Data types consist of menu, radio, integer, date, date/time, text field, and text area fields.

Database—The tables and fields that store information that is retrieved, edited, and added in a RightNow application.

dbaudit—A utility that builds and prepopulates the schema and performs the database portion of the RightNow upgrade. The *dbaudit* utility can also be used to view the database schema.

dbstatus—A scheduled utility that escalates incidents, answers, tasks, and opportunities based on business rules. The *dbstatus* utility also sends out watchlist notifications.
See Business rules *and* Watchlist notification.

Dead—One of seven default opportunity statuses and status types. An opportunity with the Dead status is no longer being pursued by a sales representative.

Decision—A component of a campaign. Decisions filter contacts by specified criteria and can have Yes and No paths.

Decryption—The process of converting encrypted text into readable text using private keys assigned to authorized persons.

Default directory—The directory containing original default copies of all the files customizable through the File Manager. During an upgrade, any

files that have changed will also be updated in the default directory. Using the restore function, a file can be restored to the original configuration.

Default response requirements—The maximum time allowed (in minutes) for incident response and resolution within the operating hours defined by the organization. The default response requirements are used to measure agent performance in responding to and solving incidents and can also be used as the response requirement for SLAs that do not have customized response requirements. *See also* SLA *and* Response interval.

Design space—The section of the workspace designer where fields and controls are added, edited, moved, and removed to create a workspace.

Dialed number identification service (DNIS)—A service that identifies the telephone number that the caller dialed. This is useful if several telephone numbers are redirected to a single destination number.

Disconnected access—The mode in which RightNow Sales functions when an Internet connection is not present. When an Internet connection is not present, RightNow Sales communicates with the offline (local) database. Also called *offline mode*.

Display position—The position where a new answer appears on the Find Answers page. Options include Historical Usefulness; Place at Top, Middle, or Bottom; Fix at Top, Middle, or Bottom. The display position is selected from the answer's Display Position drop-down menu.

Disposition—*See* Incident disposition.

Distribution list—A mailing list of non-staff member email addresses used for scheduling reports or any mailing event.

Docked filter—A run-time selectable filter or output variable that is added to the top of a report. Docked filters let report users select different run-time filter values and output variables in the report, bypassing the Search window.

Document—The material used in a survey, mailing, or served as a web page that can contain text, snippets, conditional sections based on contact filters, merge fields, links, and web forms.

Dormant incident—An incident that is not returned when performing word- or phrase-based searches. After remaining in the Solved status for a specified time, incidents become dormant to ensure that the knowledge base is populated with the most useful and timely information.

Draft—The preliminary status of a mailing or survey. When a mailing or survey is created, it is set to the Draft status. The status will also return to Draft if the mailing or survey's schedule is canceled.

Drill down—To start at a top or general level and become more specific at each lower level. RightNow's drill-down feature enables access to additional output levels in reports.

Drill-down filter—The fields in an output level used to filter the data returned when drilling down to another output level. This impacts what data is returned in the drill-down level.

Drill-down link—The field in an output level that is used as a link to drill down to the next output level.

Dual tone multi frequency (DTMF)—The system used to identify the numbers on the telephone keypad by using two tones of different frequencies for each key. This is used by the dialed number identification service.

Editor—A layout format on the content pane of the Administration Console when working with administration items. The editor contains the fields for adding and editing an administration item.

Else clause—The clause that follows the Then clause of a business rule. If the conditions of a rule are met, the actions in the Then clause are invoked; if the rule's conditions are not met, the actions in the Else clause are invoked.

Email answer—A feature that enables customers to email answers they are viewing to a specific email address.

Email management—A function of RightNow that sends and receives email messages, processes bounced messages, intelligently routes incoming inquiries based on business rules, and automatically suggests answers to inquiries.

Email message—An email message that is automatically sent by RightNow to customers or staff members. The sending of email messages is triggered by events in RightNow applications. For example, when a customer submits a question in RightNow Service, the Question Receipt message will be sent to the customer's email address. Email messages can be enabled or disabled, sent in ASCII text or HTML format, and the text, headers, and footers can be customized.

Encryption—The process of translating a text message into unreadable text to ensure security. Encrypted messages may be read only by authorized persons with access to a private key that allows them to convert the message back into readable text.

End-user interface—All the pages in RightNow Service that customers can access to look up answers, view their account information, request a Live chat or callback, and ask a question. Certain functions can be restricted and require a customer account.

Escalation—A means of tracking answers, incidents, opportunities, and tasks using business rules. When a rule's conditions are met, the rules engine schedules escalation to the new level. When the scheduled time (based on absolute or relative time) arrives, the rules engine sets the escalation level and takes the action specified by the rule, such as sending an email, notifying a manager, or following up with a customer.
See Business rules.

Even split mode—A market testing mode that sends test messages to equal portions of an audience for broadcast mailings.
See Market testing.

Everyone access level—An access level designed to allow answers to be visible to all staff members and customers depending on the answer status.

Exception—A method of highlighting report data that meets certain criteria. Data exceptions also allow email alerts to be sent when data in a scheduled report meets the exception criteria.

Exchange rate—A scale of monetary conversion from one currency to another.
See Currency.

Expanded File Manager—A version of the File Manager that provides additional access to the *enduser* and *mail* directories for further modification of the end-user interface and the format of the email messages sent to customers.
See also File Manager *and* Basic File Manager.

Explorer—A layout format on the content pane that displays a tree on the left, containing folders and other items, and a detailed list of the selected folder's contents (sub-folders and files) on the

right. Explorers are available for certain administration items on the Administration Console and certain components on the RightNow Console.

Expression—A component of fixed and run-time selectable filters that defines a function, database column, value, or any combination of the three.

External event—A program or script that runs as the result of an event occurring in RightNow, an action specified in a business rule, or an action in a marketing campaign.

FCRR (first contact resolution rate)—A statistic that reports how often staff members or groups solve incidents with only one response. This number is displayed as the percentage of incidents solved with only one staff response.

File—A file that is uploaded to RightNow Marketing for attaching as a link in a document or snippet. From the Content Library, files can be uploaded and their characteristics can be defined.

File attachment—A file that is attached to an answer, contact, incident, opportunity, or organization, or sent with an incident response or sales quote. Files that are permanently attached to an incident or answer can be viewed by customers on the end-user interface; all file attachments can be viewed by staff members on the RightNow Console. Files that are sent with an incident response can be opened with the customer's email client and are not permanently attached to the record.

File attachment answer—A type of answer that appears as a file attachment.

File link—A clickable link to a file attachment that is inserted in a snippet or a document.

File Manager—The interface used to access modifiable files for RightNow products. The File Manager is available in Basic and Expanded versions. Administrators can modify files used to customize a site's end-user interface, email messages sent to customers, image, word lists, and dictionary files.
See also Basic File Manager *and* Expanded File Manager.

Final message—A mailing format used to send the mailing as final. In broadcast mailings, final messages are sent to all audience members who have not yet received a test message.

Find Answers—A link on the Support Home page that opens the Find Answers page where customers can view answers and search the knowledge base. Customers can view individual answers or search the knowledge base using selection criteria to narrow their search. If enabled, customers can also use the Browse search method to search the knowledge base by topics or the Web Indexer to search answers, documents, and web sites.
See also Browse *and* Web Indexer.

First due—A queuing pull policy that uses the incident due date or longest wait to determine which incidents or chats to retrieve from the queue.

Fixed filter—A component of RightNow Analytics and RightNow Marketing segments used to define the data set available in the report or segment. Fixed filters are statements constructed from expressions, functions, and operators, and cannot be altered when using a segment or when running a report.

Forecast—A projection of sales revenue for an opportunity that may close in a given sales period.

Foreign key—A column or columns that contain values found in a primary key of another table. Foreign keys are used to ensure relational integrity and are rarely primary keys.
See also Primary key.

Forward to Friend link—A link that enables contacts to forward the message to another email address. This type of link can be added to documents, templates, and snippets for use in mailings, surveys, or web pages.

Function—A mathematical operator that can be applied to data from database fields to modify the data that is returned in an output column. Function also refers to a container for business rules. Functions are used anywhere in a business process that dictates doing the same thing in more than one place. Functions reduce the number of rules needed by allowing the same rules to be evaluated from multiple states.
See also Business rules *and* Rule state.

Group—A way to organize staff accounts.

Grouping—A method for grouping data in a segment. Filters can be used when grouping and are applied to the data after the grouping is completed.

Guide—Information about a promotion generated by a marketing staff member. This information appears on the Offer Advisor window to help an agent present the promotion to a customer.

Help access level—An answer access level for context-sensitive answers. Help answers are not visible to customers except through special hyperlinks.
See Context-sensitive answers.

HTML answer—A type of answer that appears to customers as standard HTML on the end-user interface.

HTML editor—A WYSIWYG (what you see is what you get) editor for formatting and editing answers, mailings, campaigns, documents, questionnaires, and invitation messages in HTML without previous HTML experience.

iKnow—RightNow's intuitive knowledge foundation that incorporates the self-learning knowledge base, customer data, and analytics to respond in an intuitive, intelligent manner when interacting with customers and staff members.
See also Self-learning knowledge base.

imgupd—A utility that updates the color of the corner GIFs used in making the tabs on the end-user interface to match the colors in the *enduser.css*. This utility must be run if any modifications are made to the colors in the *enduser.css*.
See also Corner GIFs.

IMP (import) file—A data file with an extension of *.imp* that is used by the *kimport* utility to map values in the CSV file to columns in the RightNow database.

Inactive—One of seven default opportunity statuses and status types. An opportunity with the Inactive status is no longer being pursued but could be activated at a later date.

Inbox—An agent's personal queue consisting of all the incidents that have been assigned to the agent.

Inbox limit—The maximum number of incidents in an agent's inbox that cannot be exceeded when pulling from a queue. The inbox limit is set in the profile to which the agent is assigned.

Incident—Any question or request for help submitted by a customer through the Ask a Question page, email, a Live chat session, site or answer feedback, or from an external source using the API. Incidents can also be added by agents when they work with customers by phone, fax, or mail.

Incident archiving—A process that permanently removes incidents from the database. Archived incidents are then stored in searchable data files that can be accessed from the RightNow Console.

Staff members can access archived incidents once the Archived Incidents component has been added to their navigation set.

Incident custom field—A field for gathering and displaying additional information about incidents. Incident custom fields appear when adding or editing an incident and on the Ask a Question and My Stuff–Questions pages.

Incident disposition—An option for classifying and recording how incidents are ultimately resolved. Up to six levels of incident dispositions are available. Also called *disposition*.

Incident queue—A sequence of unassigned, unresolved incidents. When an incident queue is added, it can be defined as the default queue. Incidents are added to queues automatically by business rules or manually by re-queuing and are handled in a first-in, first-out manner.

Incident severity—An option for classifying and recording an incident's importance and urgency.

Incident status—A method of tracking an incident's state. The default incident statuses are Solved, Unresolved, Updated, and Waiting, and custom statuses can be added.

Incident status type—The status of an incident as it moves through the system. Default incident status types are Solved, Unresolved, and Waiting.

Incident thread—The list of all activity on an incident, including the original question, agent responses and updates, customer updates, records of conversations, and staff member notes about the incident (which are not visible to customers). The incident thread lists activity in chronological order and can be filtered by thread type.

Indexing—A process in which the text of an answer or incident is stemmed and indexed into keywords and phrases. These keywords and phrases are used to build the answer and incident phrases tables that are used during text searching. When an answer is added or updated, the Keywords, Summary, Question, and Answer fields are stemmed and indexed to create one-, two-, and three-word phrases. When an incident is added or edited, the Subject field and incident thread are stemmed and indexed to create one-word phrases.

Industry type—An option for classifying organizations by type of industry.

Information gaps—A report that clusters incidents in RightNow Service and compares the topics to answer clusters, allowing organizations to pinpoint those areas (or gaps) in the knowledge base needing additional answers.

Initial state—A required state in every rule base. The rules engine evaluates a new or updated object using all rules in the initial state. Unless one or more rules in the initial state transition the object to a function or different state, the rules engine stops after all the rules in the initial state have been processed.
See also Rule state.

Inline—A method of displaying output definitions and filter definitions as lines of text in the report.
See also Output definition.

Inner join—A relational database operation that selects rows from two tables on the condition that the value in the specified column of the primary table is equal to the value in the specified column of the secondary table.
See also Outer join.

Intellisense—A feature in RightNow Analytics that assists staff members when entering information in an expression field. As a staff member types an entry, Intellisense displays a list of database

tables that begin with the letters typed. The staff member can either continue typing the expression, or select a table and field from the list.

Interactive voice response (IVR)—A telephone system application that allows callers to provide information (for example, incident reference numbers or organization name) to the system using either their voice or a touch-tone keypad.

Interface—The consoles, windows, and pages used by staff members and customers to access a RightNow application and interact with a single knowledge base. The interface name determines the URL for the web site, the name of the RightNow executable, and the *.cfg* directory name.
See also Administration interface *and* End-user interface.

Interface Manager—A utility for managing multiple interfaces using one RightNow knowledge base.

Invitation method—A way of distributing a survey: broadcast survey, transactional survey, or website link.

Java client—The default Java applet interface for RightNow Live. The Java client is automatically used in place of the thin client if RightNow Live Collaboration is enabled or if the customer is requesting to chat from a web browser other than Internet Explorer. The Java client is larger than the thin client and requires that the Java plug-in be installed on the customer's computer. Also called *user applet*.
See also Thin client.

Java Runtime Environment (JRE)—A software program that interprets Java-compiled programs into a format your computer's operating system can understand. Also called *Java plug-in*.

kexport—A utility for exporting either single tables or an entire database from a RightNow application.

keywordindexer—A utility that creates an index of the keywords found in incidents, answers, file attachments, and documents indexed by the Web Indexer. The keyword indexes are used when searching incidents, answers, file attachments, and other indexed documents.
See also Web Indexer.

kimport—A utility for importing data, either single tables or an entire external database, into the RightNow database.

Knowledge base—All information (such as answers, incidents, contacts, organizations, opportunities, products, staff accounts, mailings, and campaigns) maintained and presented by RightNow in a meaningful way; knowledge base also refers to the interrelationships among the pieces of information.

Knowledge engineer—The staff member responsible for populating and maintaining the answers in the knowledge base for RightNow Service. Responsibilities may include identifying when answers should be added, editing proposed answers, and reviewing existing answers to keep them current.

langcvt—A utility for changing the language pack in RightNow from English to an alternate language pack. This utility converts the message bases and prepopulated knowledge base to the new language.

Language—The language for a specific interface that determines, in part, what answers are visible for viewing by customers.

Launched—A mailing and survey status that indicates a transactional mailing or transactional survey has been launched and can be included in a rule or campaign.

Layout—A predefined format that can be used in custom reports to apply fonts, colors, and other display options. Layouts can also be used in dashboards to apply a predefined structure for inserting reports.

Lead—A potential opportunity. A lead is a contact discovered through a marketing campaign and forwarded to a sales representative through RightNow Sales.
See Opportunity.

Lead rejection type—An option for classifying and recording the reasons for rejecting a lead.

Learned link—Related answers that have a learned relationship as a result of customer activity.

Live Assistance—A link on the Support Home page that customers can click to submit a request to chat with a RightNow Live agent or have an agent call them back. This function in RightNow Service provides two-way, real-time chat and telephone callback.

Live session routing—A process of routing customer requests for RightNow Live chat or callback to a specific queue based on rules in the Live session routing rule base.
See Chat session queue.

Logical expression—An expression that defines the relationship between report filters or business rule conditions. The components of a logical expression are joined using Boolean logic, and can be grouped and joined with AND, OR, and NOT operators.

Logical operators—The symbols, (+) and (–), that can be used in most search techniques in RightNow Service to explicitly find answers that have a word (+) or that do not have a word (–).

Login window—A window for entering login name, password (if required), and site information to access the administration interface of a RightNow application.

Lost—One of seven default opportunity statuses and status types. An opportunity with the Lost status has been lost, for example, to a competitor.

Mailbox—An email box specified in RightNow and dedicated to collecting email inquiries sent by customers, responses to mailings, and bounced messages. Incoming emails are processed by RightNow's utility *techmail*.
See also techmail.

Mailer daemon (rnmd)—A utility that monitors RightNow Marketing and RightNow Feedback, listening for requests from other components to start the email process. The mailer daemon is installed during the initial installation and can be configured to send messages in the most efficient manner for an organization.

Mailing—A collection of one or more messages sent to one or more contacts. A mailing can contain multiple messages for testing purposes.

Mailing status—A method of tracking the state of a mailing. The default mailing statuses include Draft, Launched, Scheduled, Preparing to Send, Sending, Suspended, Suspended by Error, Canceled, and Completed.

Manual policy—A pull policy that enables agents to manually pull incidents into their inbox from any queue designated in their profile.

Manually related answer—A relationship between two or more answers manually defined by a staff member.

Market testing—A method for testing different message formats in mailings on a percentage of the audience before launching a final email. Market

testing is available in even split and sampling modes.
See Even split mode *and* Sampling mode.

Mask—A defined pattern that determines the format of information that can be typed in a field. A typical mask is one used for domestic phone numbers, which requires that thirteen numbers be typed in the field.

Menu—The items arranged horizontally across the top left of the RightNow and Administration Consoles. Each item contains a list of options for accessing other areas in RightNow, adding records and other items to the knowledge base, changing the appearance of certain elements on the console, and accessing general RightNow help.

Merge field—A field that looks up contact information and inserts it in the text of a document, snippet, or mail attributes of a mailing. Merge field also refers to a database field that can be inserted in quote templates and merged with opportunity data. Merge fields act as variables and are visible on the Quote Template toolbar when creating quote templates.

Message—An email consisting of a collection of HTML, text, and images in a particular format.

Message base—An editable text string that allows international language support and customization of headings, labels, buttons, and other text on RightNow administration and end-user interfaces and in email messages and notifications.

Message Base Editor—The editor used for customizing the message bases, including all the headings, labels, buttons, and other text on RightNow administration and end-user interfaces.

Monitor—A feature in RightNow Live that allows a supervising agent to monitor the chat sessions of other agents and to intervene when necessary.

msgtool—A utility for creating a configuration report for a RightNow site, or for changing configuration settings when an error has been made in one of the settings that subsequently locks staff members out of the Configuration Editor.

Multi-level Browse—An option in the Browse search method that allows customers to navigate the knowledge base using a graphical interface similar to a file management system. This search is designed for advanced users who know what they are looking for and want the freedom to view the topic clusters in the knowledge base to find their own answers.
See also Browse *and* Single-level Browse.

Multi-select—A feature for updating more than one record at a time.

Multiline—A method of displaying report data grouped under headings based on common values in report columns.

My Stuff—A link on the Support Home page that takes customers to their account information. Customers can view and update all the questions they have previously submitted and view any answer notifications to which they are subscribed. They can also view and edit their search preferences and account and contact information. This component is restricted and requires a customer account.
See Customer account.

Natural language—Any approach that accepts and correctly handles human language. For example, English, French, and Japanese are natural languages; computer languages, such as FORTRAN and C, are not. RightNow Service provides natural language technology for searching the knowledge base.

Navigation buttons—The buttons on the navigation pane of the RightNow Console associated with record types and components. Clicking a button displays that record type or component's navigation list.

Navigation list—All the reports, folders, and items associated with a specific record type or component in RightNow. Navigation lists are organized in a tree on the navigation pane.

Navigation pane—The area on the left side of the RightNow Console containing a navigation list on the top and navigation buttons on the bottom. The navigation pane on the Administration Console contains administration items on the top and administration buttons on the bottom.

Navigation set—Any combination of navigation lists and their associated navigation buttons. Staff members are assigned a default navigation set in their profile.

Normalized URL—A URL that has been reformatted to ensure that documents that are referred to by multiple URLs will be indexed only once. Normalization may include reformatting domain names (for example, removing capital letters) or removing query parameters.

Note—Information that can be added to campaigns, contacts, documents, mailings, opportunities, organizations, and surveys for internal reference. Notes can also be added to incidents in the incident thread.

Notification—A message that notifies appropriate staff members about incidents, answers, mailings, campaigns, opportunities, and system errors.

Object—The specific answer, contact, incident, Live session, opportunity, organization, target, or task that is evaluated by the rules in the object's rule base.
See also Object class.

Object class—A grouping of database entities, including answers, contacts, incidents, Live sessions, opportunities, organizations, targets, and tasks, for which business rules have been defined. Each object class has a separate rule base for evaluating objects.

Offer—A promotion developed by marketing personnel or a product suggestion generated automatically by Offer Advisor that is presented to a customer by an agent.

Offer Advisor—A feature in RightNow Service for creating and presenting promotions to customers and for making automatic recommendations based on customer attributes and purchase history.

Offline mode—The mode in which RightNow Sales functions when an Internet connection is not present. In offline mode, RightNow Sales communicates with the offline (local) database. Also called *disconnected access.*
See Disconnected access.

Online mode—The mode in which RightNow Sales functions when an Internet connection is present. In online mode, RightNow Sales communicates with the online (remote) database.

Operating system—The program that, after being initially loaded onto the computer by a bootstrap program, manages all other programs in a computer. UNIX, Windows, VMS, OS/2, and AIX are all examples of operating systems.

Operator—A symbol or word that represents a mathematical or logical action that can be applied to a condition or value.

Opportunity—Information on a specific sale or a pending deal that is tracked and maintained in the knowledge base.

Opportunity custom field—A field for gathering and displaying additional information about opportunities. Opportunity custom fields appear when adding or editing an opportunity.

Opportunity status—A method of tracking an opportunity's state. The default opportunity statuses are Lead, Reject, Active, Closed, Lost, Inactive, and Dead. Custom statuses can also be added.

Opt-in—An option to include a contact in mailings and surveys.

Opt-out—An option to exclude a contact from mailings.

Organization—Any company, business unit of a large company, or government agency that has an organization record in the knowledge base.

Organization address type—A way of storing multiple addresses for a single organization. The default organization address types are Shipping and Billing, and custom address types can be added.

Organization association—A feature for associating a contact with a specific organization. Organization association links the incident and opportunity history of the contact and organization.

Organization custom field—A field for gathering and displaying additional information about organizations. Organization custom fields appear when adding or editing an organization.

Organization hierarchy—A feature for creating or changing the hierarchy of organizations. A hierarchy can be created by making one or more organizations subordinate to another organization. Twelve hierarchy levels can be used.

Outer join—A relational database operation that selects rows from two tables regardless of whether the specified columns contain corresponding values. An outer join will return all rows from the primary table and any rows from the secondary table where the value in the specified column of the primary table is equal to the value in the specified column of the secondary table.
See also Inner join.

Outlook add-in—The toolbar that displays in Microsoft Outlook when Outlook Integration is enabled. The Outlook add-in allows sales representatives to share contacts and tasks and synchronize email between RightNow Sales and Microsoft Outlook.

Output definition—A description of a report that can be viewed when generating a report or when mousing over the report title and columns. Output definitions are predefined for all standard reports and can be defined when creating a custom report.

Output level—A distinct section of a report that outputs report data. Reports can have multiple output levels, each of which can have their own filters, groupings, data exceptions, headers, footers, and descriptions. Output levels in a report are related through drill-down links and drill-down filters.

Page—A web page; an end-user page in a RightNow Service application.

Path—The connector between items in a campaign workflow diagram. A path can be one of four types (Standard, Submit, Yes, or No) and can connect two actions or an action and decision in campaigns.
See also Action *and* Decision.

Personal settings—Options defined in staff accounts that can be changed by staff members, including default currency, default country, time zone, and email notifications. The staff account settings changed from the Personal Settings option will override what has been defined for those settings in the staff account.

Pipeline—Calculated revenue that has not yet been acquired but is forecasted to close in a specified time period.

Preparing to Send—A mailing and survey status that indicates a broadcast mailing or broadcast survey is about to be sent.

Price schedule—An option for creating various pricing levels that can be assigned to sales products. Price schedules allow the same product to have different prices, such as wholesale and retail prices.

Primary key—A database table column that is indexed to enforce a unique constraint, meaning that a given value cannot appear more than once in the column. This column is used to uniquely identify each record in the table. Primary keys are often the target of a foreign key in a different table.
See also Foreign key.

Priority—A ranking that defines the order in which RightNow Service pulls incidents from multiple queues. The priority ranking also identifies which queues agents can retrieve incidents from.

Private—One of two default answer status types. Answers marked Private are never visible to customers.
See Answer status type.

Private branch exchange (PBX)—A telephone switch that is owned and operated by a private party.

Private key—A password-protected key used by the holder to create digital email signatures and decrypt messages that were encrypted using the holder's associated public key.

Privileged access answers—Answers that are assigned a custom access level for viewing by certain contacts and organizations assigned to the appropriate service level agreement.
See SLA.

Product—An option for grouping answers and incidents that allows more precise organization in the knowledge base. Staff members can classify answers and incidents by product and up to five additional levels of sub-products, allowing more refined searching by customers and staff members.
See also Category.

Product catalog—The list for organizing sales products.

Product linking—An option for linking products to categories and products to dispositions so that only the categories and dispositions that have been linked to a product appear when the product is selected on the administration or end-user interface.

Professional Services—Services provided by RightNow Technologies, including training, support, and consulting.

Profile—A mechanism for controlling access to administration functions and for assigning staff members specific permissions, default workspaces, default navigation set, and report access.

Promotion—A specific message (for example, a discount, renewal notice, or announcement) delivered to a specific group of customers using Offer Advisor. Promotions are generally created by marketing staff members and presented to customers by agents.
See Offer Advisor.

Proof—A way to review the content of a mailing or survey to ensure the message is approved by the necessary contacts and staff members and as a final check for any mistakes. Proofs can be sent to a proof list or group of staff members who, in turn, can accept or reject the proof.

Proof list—A group of contacts, either internal or external, who review mailings and surveys before they are finalized.

Propose answer—A function for proposing that an incident's solution be added to the answers available to customers on the end-user interface. The proposed answer is reviewed by the knowledge engineer, who determines if it should be made public and, if so, its access level, status, language, and visibility.

Proposed—One of four default answer statuses. This answer status indicates that the answer has been proposed by a staff member from an incident. Answers with a Proposed status are not visible to customers.
See Answer status.

Provide Feedback—A link on the Support Home page that customers can click to submit feedback about an organization's web site, customer service, or product satisfaction.

Public—One of two default answer status types and one of four default answer statuses. Answers marked Public may be visible to customers depending on their access level and language.
See Answer status type *and* Answer status.

Public key—Public information that may be attached to email messages to allow those who reply to the message to encrypt their response. The public key also verifies that the digital signature was created with the associated private key, thereby ensuring the integrity and authenticity of the message. Public keys are often referred to as public certificates, although certificates hold additional information besides the public key.

Publish report—A method of preserving a report's graphical and tabular output as a snapshot. Once a report is published, it cannot be modified and the report data will remain unchanged even as the knowledge base is updated.

Pull policy—The method for determining which queues agents can retrieve incidents or receive chat requests from and in what order. Pull policies include Strict Priority, Manual, and First Due.

Pull quantity—The specified number of incidents to be retrieved from the queue at one time when an agent pulls incidents.

Question—The main element in a survey. Text and choice question types can be created. Questions can be used in multiple surveys, mixing and matching as necessary.
See Text question *and* Choice question.

Questionnaire—The complete set of questions and all the pages in a survey. Using the HTML editor, staff members can create dynamic surveys using a graphical interface to add questions and create survey branches based on how customers answer. A questionnaire must be created for each survey.

Queue—*See* Incident queue *and* Chat session queue.

Quick Search—A component on the RightNow Console used to search for records and files when only limited information is known. Quick Search can be used to search the knowledge base no matter what navigation list is displayed or what is open on the content pane. RightNow contains a number of default Quick Search reports, and other reports can be added to the Quick Search button in navigation sets.

Quota—The revenue goal assigned to a sales representative during a specified time period, such as month or quarter.

Quote—A formal price assigned to a sales product for a particular customer during a sales period. Quotes also include any discounts applied as well as the valid dates for the quote.

Quote template—A template defined for a specific type of sales quote. Quote templates are used when generating a quote for an opportunity.
See also Quote.

Record tabs—All the tabs associated with the open record on the content pane of the RightNow Console. Each tab contains fields and options for adding and updating record information.

Regular expression—A combination of operators and character strings used to define a search field or a condition statement in a business rule.

Reject—One of seven default opportunity statuses and status types. A lead with the Reject status has been rejected by a staff member.

Related answers—A feature that assists customers in finding answers to questions related to the current session history. Related answers appear on the bottom of the Answer page and are sorted by relatedness—those answers that appear at the top of the list are most related to the answer being viewed.

Related browse topics—A list of browsable answer groups that can be displayed under the search results on the Find Answers page. Related browse topics provide an alternate means for customers to locate answers.

Relationship item—A control used to create workspaces. Relationship items can include lists of records as well as other information, such as audit logs and file attachments.

Relative time—The number of hours from a specific event or time, such as two hours from the time an incident was created; relative time is used in business rules and custom reports. In standard reports, relative time is the amount of time passed based on an organization's work hours.
See also Absolute time.

Report—Any standard report, custom report, or list of records accessed from a navigation list on the navigation pane of the RightNow Console. Standard and custom reports can also be accessed from the Reports explorer, which can be opened from both the RightNow and Administration Consoles.

Report control—A control that inserts a report into a workspace.

Report outline—A component of the report design center in RightNow Analytics that contains a list of all the elements that can be added to a custom report. Parameters, output levels, headers, footers, charts, tabular data, and data exceptions are just some of the elements that can be added to each custom report.

Report schedule—An option for subscribing to a standard or custom report. Staff members can schedule the report to be sent to an individual staff member, a group of staff members, a distribution list, an external email address, or any combination of these options.

Report section—A section of an output level that contains a component of the report's output, such as a title, chart, or tabular data.

reportgen—A scheduled utility that sends out scheduled reports.
See Report schedule *and* Scheduled report.

Re-queuing—The action of moving an incident from an agent's inbox into a queue.

Resolution time—The maximum allowable time (in minutes) set by a service organization for resolving incidents.
See also Default response requirements.

Response interval—Defines when a service organization makes itself available to respond to and solve incidents on a daily basis in RightNow Service. Days and hours can be specified.
See also Default response requirements.

Response requirements—The maximum time allowed (in minutes) in RightNow Service for incident response and resolution associated with a particular SLA.
See also Default response requirements *and* SLA.

Response time—The maximum allowable time (in minutes) set by a service organization for initially responding to new incidents.
See also Default response requirements.

Restricted functions—Those functions on the end-user interface that require a customer account (contact record in the knowledge base) to access. Customers must have a customer account to ask a question and access My Stuff.

Result grouping—A feature in a report definition for selecting fields to group data by. Result grouping provides a more organized view of a report. Multiple levels can be defined for result grouping; the more levels used, the finer the detail will be.

Review—One of four default answer statuses. This status can be used to notify the knowledge engineer when a public answer needs to be reviewed.
See also Answer status.

RightNow Analytics—A business analytics software that provides organizations with full visibility into all of their customer touch points across sales, marketing, service, and feedback.

RightNow Console—The console for working on records (answers, contacts, incidents, opportunities, organizations, and tasks), chatting with customers in RightNow Live or talking with them on the phone through CTI, working with campaigns and mailings, generating standard reports and creating custom reports, accessing notifications, and searching with Quick Search.

RightNow Feedback—A customer survey tool for gathering information about customers' experience with an organization. With a wide range of customization and formatting options, questions types, and full analytics for efficient reporting, surveys provide organizations with a flexible method of tracking customer satisfaction.

RightNow Live—A component in RightNow Service that provides customers with access to RightNow Live agents for questions and issues that require human interaction. Also called *Live chat*.

RightNow Marketing—An email and campaign solution for delivering personalized, richly formatted email communications to targeted segments of customers and prospects and for launching full-scale marketing campaigns.

RightNow Sales—A sales automation solution that enables sales representatives to easily manage and track all opportunity, organization, and contact information and track all quote interactions in one consolidated application.

RightNow Service—A customer service and support solution that intelligently assists both customers and agents with inquiry resolution across traditional and online channels. RightNow Service assists customer service and support organizations that need to easily capture, respond to, manage, and track all service interactions in one consolidated application.

RightNow Wireless—The interface for accessing RightNow Service from a wireless phone or any device with a WAP (wireless application protocol) browser, such as a PDA (personal digital assistant).

Rollover—A method of displaying additional report details by mousing over data described in the report's output definition.

Rollup—A method of displaying report data that groups records together by specific fields. The grouped records are displayed under headings that can be expanded or collapsed to display or hide the records under the heading.

Root certificate—A self-signed certificate generated by a party that signs other public certificates. Certification authorities may authorize other entities to issue certificates; the root certificate belongs to the top-level certification authority.

Round-robin queue—A type of incident queue in which unresolved incidents are automatically assigned to agents in a rotating fashion.

RPA (responses per assignment)—A statistic that calculates the average number of times a staff member or group responded to each incident.

Rule—*See* Business rule.

Rule base—All rules, states, functions, and variables associated with a particular object class (answers, contacts, incidents, Live sessions, opportunities, organizations, targets, and tasks) in business rules.

Rule log—A feature for viewing the rule or rules that have fired against a specific answer, contact, incident, opportunity, organization, or task.
See also Business rules.

Rule state—A container for business rules. Every rule base must contain an initial state, and states can be added to handle all stages of object processing. Rules in the initial state can transition objects to other states in the rule base.
See also Initial state.

Rules engine—The software that evaluates objects to determine if they meet the conditions of any rules in the rule base and then executes the actions defined in the rules.

Run-time selectable filter—A component of RightNow Analytics that defines the initial data set available in the report and allows staff members and customers to customize the data returned. Run-time selectable filters are statements constructed from expressions, functions, and operators, and can be customized when running a report and by customers on the Preferences section of the Edit My Profile page of the end-user interface.

S/MIME (Secure Multipurpose Internet Mail Extensions)—A standard for sending secure email messages that can verify the sender's identity. S/MIME emails can be encrypted for security and signed to verify authenticity.

Sales period—The period of time used to track the revenue goals assigned to each sales representative. The default sales periods are annual, semi-annual, quarterly, monthly, and weekly.

Sales product—An option for identifying items or services sold by an organization. Sales products can be added to quotes and promotions.

Sales products custom field—A field for gathering and displaying additional information about sales products. Sales products custom fields appear on the Details tab of the Sales Product editor.

Sales quotes custom field—A field for gathering and displaying additional information about sales quotes. Sales quotes custom fields appear when sending a quote with an opportunity.

Sales representative—A staff member who may be assigned opportunities and who may also maintain contact and organization records.

Sampling mode—A market testing mode that sends test messages to a specified percentage of the audience. After determining the most effective message, a final message can be sent to any audience members who did not receive a test message. *See* Market testing.

Scheduled—A mailing and survey status that indicates a broadcast mailing or broadcast survey is ready to be sent and will be emailed at the scheduled send date and time.

Scheduled report—A report that is sent as an HTML email or HTML email attachment to staff members, distribution lists, or external email addresses at specified times. Scheduled reports can also be sent when alerts defined in data exceptions are triggered.

Schema—The structure of a database system described in a formal language supported by the database management system. In a relational database, the schema defines the tables, the fields in each table, and the relationships between fields and tables.

Score—A calculated value that ranks the order of displayed answers. An answer's score is determined by its solved count and any display position that was set when the answer was added or updated.

Screen pop—*See* CTI screen pop *and* Third-party screen pop.

Search and selection criteria—The run-time selectable filters and sorting options that can be defined when searching for a particular record. *See also* Run-time selectable filter.

Search index—A matrix that includes a list of important words within a document and their document of origin, allowing efficient searching. In some cases, the matrix is a database table; in other instances, the matrix is a file stored on a hard drive. For a word or phrase to be searchable within an incident, answer, file attachment, or external document, it must first be indexed.

Secure email—Incoming and outgoing email that has authenticity (the sender is who it appears to be), integrity (content has not changed during transmission), and privacy (only the intended recipient can read it).

Seeding—The initial set of answers in the knowledge base.

Segment—The criteria for creating dynamic lists of contacts based on user-defined filters. Multiple filters can be created and logical expressions can be used to create the exact data set needed to target contacts. Once a segment is created, it can be used in broadcast mailings and surveys and the group of contacts will be constantly adjusted and updated as they meet or fall outside of the segment's requirements.

Self-learning knowledge base—The automatic generation of self-service content based on customer interactions so that the most pertinent information is presented.
See also iKnow *and* Knowledge base.

Sending—A mailing and survey status that indicates the broadcast mailing or broadcast survey is currently being sent to contacts. The system automatically sets the status to Sending after the mailing or survey is done being prepared to send or at the scheduled date and time.

Service level agreement—*See* SLA.

Session—The period of time a customer spends looking for a satisfactory answer to a question. A session ends when one of the following occurs: A customer responds with a 100% rating to the question "How well did this answer your question?" on

the Answer page, the customer submits a question, the customer exits RightNow Service, or one hour passes.

Session tracking—A feature that tracks a customer's current session history; that is, the pages on the end-user interface that the customer clicked before submitting a question.

Sharing—The process of sharing contacts, tasks, or both between Microsoft Outlook and RightNow Sales. All sharing functions are initiated from the Outlook add-in toolbar in Microsoft Outlook.
See also Outlook add-in.

Sibling answer—Related answers that share the same product or category. These related answers may also contain the same file attachments.

Single-level Browse—An option in the Browse search method that provides customers with general topics they can choose from and then narrows to a specific answer. This option is designed for users who prefer to be guided through their search.
See also Browse *and* Multi-level Browse.

SLA (service level agreement)—A contract that is applied to contacts and organizations specifying the level and type of customer service they are eligible to receive. Generic SLAs are created by administrators, and SLA instances are applied to specific customers, either automatically through business rules or manually by staff members. SLA instances are called contracts on the end-user interface and can be accessed from the My Stuff page.
See also Default response requirements.

SLA instance—A customer's individual copy of an SLA. An SLA is a generic contract that has not been applied to a specific customer; an SLA instance is a copy of the generic SLA applied to a specific customer.

Slicing—A method of grouping tabular report data by a common element. When slicing, a common value in a field can be chosen and only those rows that have that value will be returned in the report. Other slice groups can be selected from links or a tree element.

Smart Merge—A feature in RightNow Service that allows staff members to merge similar answers in the knowledge base to provide more meaningful answers to customers and to reduce duplication.

SmartAssistant—RightNow technology that uses business rules to automatically suggest possible answers to customers' email questions and Ask a Question queries. Staff members can use SmartAssistant to search for answers in the knowledge base that are related to an open incident or a current chat session.
See also Suggested answers.

SmartSense—RightNow technology that estimates a RightNow Service customer's emotional state or attitude based on the words and language they use when submitting an inquiry or when engaged in a Live chat. SmartSense also rates the incident responses sent by agents and the messages sent while engaged in a Live chat. The SmartSense rating for both customer and agent appear wherever they have been placed on the workspace.

Snippet—Any text or part of a document that can be used in more than one document. Snippets can be added to documents from the Content Library component on the RightNow Console.

Soft phone functions—Standard telephone functions such as receiving, transferring, and conferencing.
See CTI.

Solved—One of three default incident status types and one of four default incident statuses. An incident marked Solved has been resolved.

Solved count—The method for determining where an answer will display in the list of answers. The most useful answers (those with the highest solved count) are pushed to the top of the list, while those with the lowest ratings are moved down on the list. When a customer clicks one of the options in "How well did this answer your question?", it directly affects the solved count. The solved count is increased for answers that are viewed, and decreased for answers viewed earlier in the same session. The solved count is also increased when an agent uses a SmartAssistant suggested answer when responding to a customer's question.

Sort order—The sort order of a report's output columns. The default sort order is defined when generating a report and can be modified when running the report.

Spacer—A control that is manually added to a workspace to maintain the row and column arrangement when fields and controls are moved and removed or to create white space in a workspace.

SSL (secure sockets layer)—An industry standard for secure Internet-based transfer of information.

Staff account—The settings for a staff member authorized to access a RightNow application, including login name, password, profile, group assignment, and email information.

Staff account custom field—A field for gathering and displaying additional information about staff members. Staff account custom fields appear on the Details tab of the Staff Accounts editor.

Staff member—Any employee with a staff account and profile authorized to access a RightNow application.

Stage—The level of completion of a particular opportunity within a specific strategy. Tasks can be defined within a stage and can be required to be completed before the opportunity can move to the next stage.
See Strategy *and* Task.

Standalone Configuration Editor—A web page that allows access to the Configuration Editor without going through the Administration Console. Entry is made using a specific URL.

Standard reports—The complete set of predefined reports available in RightNow. These reports can be copied and used as templates to create custom reports.

Standard text—Any text or response prepared in advance that can be sent to customers when responding to incidents, appended to responses by a business rule, or sent by a RightNow Live agent during a Live chat. Also called *standard response*.

State—A field that classifies how contacts and organizations were added and what actions have occurred since their creation. The State field is automatically populated when a contact or organization record is added or updated; staff members can also manually update the State field. State field options include Service, Sales, Marketing, and any combination of the three. State also refers to the current stage of an object in rules processing.
See Rule state.

Status—The current state of an answer, incident, mailing, opportunity, survey, or task.
See Answer status, Incident status, Mailing status, Opportunity status, Survey status, *and* Task status.

Status type—The current state of an answer, incident, or opportunity. Default answer status types are Public and Private. Default incident status

types are Unresolved, Solved, and Waiting. Default opportunity status types are Active, Closed, Dead, Inactive, Lead, Lost, and Reject.

Stopword—A word that is not included in the keyword indexes in RightNow Service and is not searchable as a result. Pronouns, articles, and adverbs are common stopwords.

Strategy—A sales plan defined by an organization that includes stages and associated tasks that must be completed in order for opportunities to move through each stage. Strategies allow organizations to define multiple sales plans based on their business processes and help ensure that policies and procedures are enforced.

Strict priority—A pull policy that defines the order in which the system pulls incidents or chats from multiple queues. The strict priority ranking also identifies from which queues agents can retrieve incidents.

Style—All of the specifications that can be defined for presenting graphical and tabular data in a report, including fonts, colors, and borders.

Suggested answers—The list of answers from the knowledge base that are returned when SmartAssistant is invoked, either by staff members working on incidents or engaged in chat sessions or through business rules that append answers to email questions and Ask a Question queries from customers.
See also SmartAssistant.

Suggestion—A product recommendation automatically generated by Offer Advisor using a predictive model based on customer purchase history.

Support Home—The entry page on the end-user interface that contains links to the main functions in RightNow Service. This page provides customers with quick access to the tools they need to answer their questions and receive immediate customer service.

Survey—A method of gathering customer responses and feedback. Surveys can be sent as mailings, served as a web page, or sent as events triggered by a campaign or business rule.
See RightNow Feedback.

Survey status—A method of tracking the state of a survey. The default survey delivery statuses include Draft, Launched, Scheduled, Preparing to Send, Sending, Suspended, Suspended by Error, Canceled, and Completed.

Suspended—A mailing and survey status that indicates a mailing or survey has been temporarily suspended from the Sending or Launched status.

Suspended by Error—A mailing and survey status that indicates a transactional mailing or transactional survey encountered an error and has been temporarily suspended.

Synchronization—The process of collecting and combining records from online and offline databases to ensure data is consistent between both databases. Also called *sync*.
See also Offline mode *and* Online mode.

Table instance—A component of a data set that specifies the database tables that data can be selected from and how database tables are joined in a report or segment.

Target—A specific group of customers sharing common characteristics to whom a promotion is presented. A customer may belong to more than one target.

Target rule—A type of business rule that has the sole purpose of creating a target consisting of contacts who meet the conditions established by the rule.

Task—An action or activity scheduled to be completed within a specified time. Tasks can be standalone, or they can be associated with answers, campaigns, contacts, documents, incidents, mailings, opportunities, organizations, surveys, and stages in a sales strategy.

Task custom field—A field for gathering and displaying additional information about tasks. Task custom fields appear when adding or editing a task.

Task inheritance—A feature for linking a task's assigned staff member, contact, or organization to the equivalent value in a record associated with the task.

Task status—A method of tracking a task's state. The default task statuses are Not Started, In Progress, Completed, Waiting, and Deferred.

techmail—A scheduled utility that retrieves mail from specified POP3 mailboxes. RightNow Service processes some of the mail into new incidents and routes the incidents using business rules (depending on settings). RightNow Marketing and RightNow Feedback process bounced messages to assist in tracking incorrect email addresses.

Template—A structured format used in a document in which specified sections are locked and cannot be edited and a section is open for customized content. Templates can be added from the Content Library component on the RightNow Console.

Territory—A specific geographical sales region configured in RightNow Sales. Sales representatives can be assigned specific territories for opportunity assignment. Up to twelve levels of territories can be defined.

Test message—A mailing message that can be sent to small cross-sections of an audience to test a response before launching a final message.

Text field—A customizable field containing text that is commonly added to reports. Once a text field is created, it can be added to any custom report, and then adjusted if necessary.

Text matching—A feature in Offer Advisor that enables agents to search for specific terms that best express the customer's interests. After a search, the list of promotions and suggestions on the Offer Advisor window will be reordered, and the ranking of each will reflect its relevance to the terms entered by the agent.
See Offer Advisor.

Text question—A question type that allows customers to type their answer to a question.

Thin client—The HTML and JavaScript-based end-user interface for RightNow Live. The thin client is smaller than the Java client and does not require that the Java plug-in be installed on the customer's computer. *See also* Java client.
Thin client also refers to the non-graphical interface in RightNow Service.
See Accessibility interface.

Third-party screen pop—A feature in RightNow that allows staff members to open a RightNow Console or report from a third-party application.

Time billed—A way to track the time spent responding to incidents. Data from the Time Billed field can be used for customer billing and determining average incident resolution time.

Topic word—A word that is associated with an answer or document. The associated answer or document will always be displayed to customers when the topic word is included in their search text.

Tracked link—A link that can be tracked by RightNow Marketing and reported on for statistical purposes.

Tracked link category—An option for classifying tracked links for reporting purposes. A tracked link category can have one sub-category level.

Transactional mailing—A mailing that is sent only when an event occurs. Transactional mailings are sent to a contact when the contact meets specified criteria in a campaign and can be scheduled to be sent immediately, on a specific date, or at an interval in the future.

Transactional survey—A survey that is sent only when an event occurs. Transactional surveys are sent to a contact when the contact meets specified criteria in a campaign or business rule and can be scheduled to be sent immediately, on a specific date, or at an interval in the future.

Transfer—A feature in RightNow Live that enables an agent to transfer a customer to another agent during a chat session.

Trending—A method of predicting a trend for a specified date range in the future based on a report's current data. Trending periods are defined when creating or editing a custom report and can be included in standard reports.

Unresolved—One of three default incident status types and one of four default incident statuses. Incidents with an Unresolved status have recently entered the system, either by a customer or agent.

Unsubscribe link—A link in a mailing that contacts can click to opt out of future mailings or surveys.

Updated—One of four default incident statuses. An incident marked Updated has been updated by a customer from My Stuff. Updated incidents have an Unresolved status type.

URL answer—A type of answer that consists of a link to an external URL. The URL address and the content of the web page are displayed.

User wait queue—The list of customers waiting to chat with a RightNow Live agent. As agents close chat sessions, customer position in the queue is updated accordingly. While in the wait queue, customers can search the knowledge base for answers or exit the queue without waiting for an agent.
See also Chat session queue.

Utility—Any of a number of programs in RightNow to help manage and configure a RightNow installation. RightNow utilities include *agedatabase, bulkdel, dbaudit, dbstatus, kexport, kimport, langcvt, msgtool, reportgen, techmail,* and *wltool.*

Variable—A temporary data item in a rule base. The variable is assigned an initial value that can be modified through rule actions, used as a rule condition to trigger other actions, and restored to its initial value for the next round of rules processing.

Visibility—A setting that determines where a custom field or customizable menu item will appear. Visibility settings specify the interfaces in a multiple interface installation where these fields appear; the settings can also define whether the fields appear on various administration and end-user interfaces and whether certain custom fields with customer visibility can be edited.

Waiting—One of three default incident status types and one of four default incident statuses. An incident marked Waiting has been responded to by a staff member and is waiting for a response from the incident creator.

Watchlist notification—An email sent to those customers who have requested to be notified when a particular answer has been updated.

Web form—A document in RightNow Marketing that allows contacts to input information that can be submitted to the database. Web forms are served as web pages by RightNow.

Web Indexer—A search method in RightNow Service that allows customers to simultaneously search the knowledge base along with web pages and other web-accessible documents within a specified domain.

Web spider—A software application that reads web pages and other documents and indexes the content for a search engine, often following hyperlinks from one web page to another.

Website link survey—A type of survey that is published as a web page and can be linked to from any source.

Weight—A displayed value given to resulting answers of a text search. The value is equal to the sum of the weights (for indexed words) of all the matched words from the text search. Weight also refers to an internal value given to each indexed keyword for an answer or incident. The value is relative to a constant and is based on number of occurrences, capitalization, and location of the word (ranked high to low: Keywords, Summary, Question, and Answer field for answers; Subject field and incident thread for incidents).

Win/loss factor—An option for classifying and recording reasons for winning or losing an opportunity.

wltool—A utility that is manually run after making changes to one of the wordlist files.
See Wordlist file.

Word stemming—A feature used in keyword indexing and text searching that finds the root of each word and stores the stemmed root instead of the whole word, thereby saving large amounts of space while making a search broader and more appropriate.

Wordlist file—Any of the files that can be modified to customize indexing, text searching, and SmartSense emotive ratings.

Work group—All of a record's open, associated records (for example, an incident's contact, organization, and tasks) that have been docked to the RightNow Console. When another, non-associated record is opened, the records in the work group are collapsed on a single content pane tab. All records in a work group are saved and closed in a single operation.

Workflow diagram—A graphical representation of a campaign or survey. Workflow diagrams allow staff members to diagram the actions and decisions of a campaign or survey. When the campaign or survey is launched, contacts are automatically moved through the workflow based on the specified criteria.

Workspace—The configuration of the content pane when working on answers, contacts, incidents, opportunities, organizations, and tasks, or on the Quote and Quote Product windows. Standard workspaces exist for each type of workspace, and custom workspaces can be created. The workspaces staff members use depend on their profile.

Workspace designer—The tool used to create and edit custom workspaces.

WYSIWYG (what you see is what you get)—*See* HTML editor.

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